# CX Cloud, Digital and AI for Salesforce Service Cloud

Genesys Innovations

v. 1.19-dev

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# CX Cloud, Digital and AI for Salesforce Service Cloud Installation

# Prerequisites

Before installing the package, you need to make sure that you have the following features enabled in your Salesforce org:

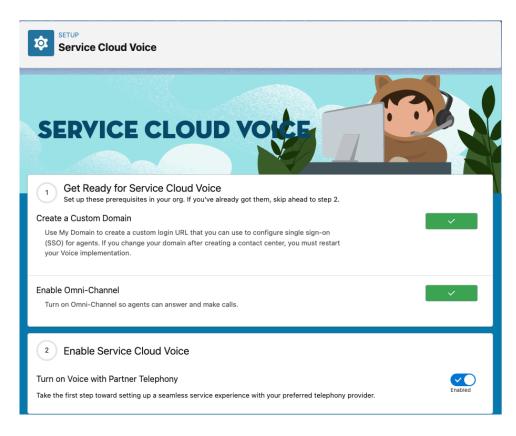
- Omni-Channel
- Service Cloud Voice

The Genesys AppFoundry CX Cloud from Genesys and Salesforce must also be installed. This package is also available on the Salesforce AppExchange.

On the setup screen of your Salesforce org, search for Omni-Channel Settings , and make sure that the Enable Omni-Channel checkbox is checked:

| Omni-Channel Settings   |                                       |
|---|---------------------------------------|
| Omni-Channel Settings   |                                       |
| Omni-Channel routes work items to your support agents. It sets agent capacity for accepting work and agent availability.  |                                       |
| To access the latest Omni-Channel features, turn on enhanced routing. You can turn it on and off, but some advanced features are<br>available only with enhanced routing. If you have standard messaging channels or any version of Chat, or use standard bots, you<br>can't use enhanced routing and must turn it off. Learn About Enhanced Routing in Salesforce Help | Enhanced Omni-<br>Channel Routing Off |
|   | Required Information                  |
| Enable Omni-Channel 🛛 🔽   |                                       |
| Enable Skills-Based and ◎<br>Direct-to-Agent Routing  |                                       |
| Enable Secondary Routing  Priority  |                                       |
| Enable Status-Based 🛛 🗌<br>Capacity Model   |                                       |
| Display a login  Display a console with Omni- Channel   |                                       |

Search for Partner Telephony Setup , and make sure that the Turn on Voice with Partner Telephony checkbox is checked:



Do not turn on "Enhanced Omni-Channel Routing".

# Install the package

Open the lightning application Admnistration Settings (you can find it in the App Launcher) that was installed during this process and open the tab Install and Update Packages :

| •<br>  | ti         | Core Services              | ~        |             | 11~ 11       |               |               | ile II:     |
|--|------------|----------------------------|----------|-------------|--------------|---------------|---------------|-------------|
| X Cloud from Genesys   | . 🗹        | Core Services              |          |             |              |               |               |             |
| Logging  | <b></b>    | Install and Update Pack    | ages     | ◀           |              |               |               |             |
| * Log Level  | 💉 E        | dit                        |          |             |              |               |               |             |
| ERROR  |            |                            |          |             |              |               |               |             |
| <ul> <li>Enable Server-Side Loggi</li> </ul>   | ing        |                            |          |             |              |               |               |             |
| Enabling this option allows t<br>These logs can contain pote<br>selecting this option, you ac<br>purposes. | ntially se | nsitive information such a | as, uniq | ue identifi | ers, package | settings, and | other technic | al data. By |

In the list of available packages, open the CX Cloud, Digital and AI for Salesforce Service Cloud package, and click on the Install now button:

#### POST INSTALL STEPS

| -                                |   | Q Search   | * =       | @? \$ 🖡 🐻     |
|----------------------------------|---|--|-----------|---------------|
| Administration Setti             | Install and Update Packa 🗸                |  |           |               |
| CX Cloud from Genesys and Sa     | alesforce Package Listings                | 11177-111777 ANNUS ANNO ANNO ANNO ANNO ANNO ANNO ANNO ANN              |           | CANNIN IIIIIC |
| > CX Cloud from Genesys and      | Salesforce Current                        |  |           | Expand All    |
| > CX Cloud, Voice for Salesford  | ce Service Cloud                          |  |           |               |
| ✓ CX Cloud, Digital and AI for S | Salesforce Service Cloud                  |  |           |               |
| Enable digital channels from Ge  | enesys Cloud within Salesforce Service Cl | oud and integrate Einstein's Next Best Action along with transcription | features. | ل Install Now |
| Not Installed Latest Release     | se 1.5.0                                  |  |           |               |
| > CX Cloud, WEM for Salesford    | ce Service Cloud                          |  |           |               |

# Post Install steps

Note: This is a work in progress. The following steps are not yet automated. The goal is to automate them in the future.

#### Create the Service Channels

Create two Service Channels:

- One for the Genesys Cloud Chat Messaging, called Genesys Cloud Messaging and related to genesysps\_\_Experience\_\_c ,
- One for the Genesys Cloud Email Messaging, called Genesys Cloud Email and related to genesysps\_\_EmailExperience\_\_c .

On the Setup screen, search for Service Channels, click on New, and fill in the form:

| Service Channels   |  |  |  |  |  |
|--|--|--|--|--|--|
| Route work from a Salesforce object, such as cases, chats, leads, or even custom objects, to support agents. |  |  |  |  |  |
| Save Cancel  |  |  |  |  |  |
| Basic Information  |  |  |  |  |  |
| Service Channel Name Genesys Cloud Messagi   |  |  |  |  |  |
| Developer Name Genesys_Cloud_Messa   |  |  |  |  |  |
| Salesforce Object Experience   |  |  |  |  |  |
| Custom Console Footer O Component  |  |  |  |  |  |
| Minimize the Omni-Channel ◎  |  |  |  |  |  |
| Automatically accept work  |  |  |  |  |  |
| Audio Settings   |  |  |  |  |  |
| Override agents' audio settings 🛛 🗌  |  |  |  |  |  |
| Save Cancel  |  |  |  |  |  |

#### Service Channels

Route work from a Salesforce object, such as cases, chats, leads, or even custom objects, to support agents.

|   | Save                |
|---|---------------------|
| Basic Information   |                     |
| Service Channel Name                                      | Genesys Cloud Email |
| Developer Name  | Genesys_Cloud_Email |
| Salesforce Object   | Email Experience ~  |
| Custom Console Footer Component                           |                     |
| Minimize the Omni-Channel widget<br>when work is accepted |                     |
| Automatically accept work requests Ø                      |                     |
| Is Interruptible 😣  |                     |
| Audio Settings  |                     |
| Override agents' audio settings                           |                     |
|   | Save                |

You can choose Automatically accept work requests if you want to have your agents answering chat conversations automatically. This will configure all agents that use this Service Channel. See the Presence Configuration section below for a more granular configuration.

#### Assign Field-Level Security

On the setup screen, search for Profiles and click on Profiles . Click on the profile the agents will use (do not click on the 'Edit' link).

|                | Profiles                                |                        |  |  |  |
|----------------|---|------------------------|--|--|--|
| Profiles       | Profiles                                |                        |  |  |  |
| All Profiles ~ | Edit I Delete I Create New View         |                        |  |  |  |
| New Profile    |   |                        |  |  |  |
| Action         | <br>Profile Name ↑                      | User License           |  |  |  |
| Edit   Clone   | Salesforce API Only System Integrations | Salesforce Integration |  |  |  |
| Edit   Clone   | Silver Partner User                     | Silver Partner         |  |  |  |
| Edit   Clone   | Solution Manager                        | Salesforce             |  |  |  |
| Edit   Clone   | Standard Platform User                  | Salesforce Platform    |  |  |  |
| Edit   Clone   | Standard User                           | Salesforce             |  |  |  |
| Edit   Clone   | System Administrator                    | Salesforce             |  |  |  |

Scroll down to the Field-Level Security and Custom Field-Level Security , click on the View link of the Experience object. Click on the Edit button and set the accesses as shown here:

#### POST INSTALL STEPS

|                                      | Edit Back to Profile | J           |              |              |
|--------------------------------------|----------------------|-------------|--------------|--------------|
| Field Name                           |                      | Field Type  | Read Access  | Edit Access  |
| Account                              |                      | Lookup      | ✓            | 1            |
| Agent Id                             |                      | Text        | ✓            |              |
| Authenticated                        |                      | Checkbox    | ✓            |              |
| Case                                 |                      | Lookup      | $\checkmark$ | 1            |
| Completed                            |                      | Checkbox    | ✓            | 1            |
| Contact                              |                      | Lookup      | ✓            | 1            |
| Created By                           |                      | Lookup      | $\checkmark$ |              |
| Customer Id                          |                      | Text        | ✓            |              |
| Detail Analytics                     |                      | URL         | ✓            |              |
| Ended                                |                      | Date/Time   | $\checkmark$ |              |
| Experience Name                      |                      | Auto Number | ✓            |              |
| Genesys Cloud Interaction Transcript |                      | Lookup      | ✓            |              |
| ntent                                |                      | Text        | $\checkmark$ |              |
| nteraction Id                        |                      | Text        | ✓            | $\checkmark$ |
| ast Modified By                      |                      | Lookup      | $\checkmark$ |              |
| .ast utterance                       |                      | Text        | $\checkmark$ |              |
| Media Type                           |                      | Picklist    | ✓            |              |
| Vext Experience                      |                      | Lookup      | $\checkmark$ |              |
| Dwner                                |                      | Lookup      | $\checkmark$ | ✓            |
| Previous Experience                  |                      | Lookup      | ✓            |              |
| Queue Id                             |                      | Text        | ✓            |              |
| Queue Name                           |                      | Text        | $\checkmark$ |              |
| Related Object                       |                      | Picklist    | ✓            |              |
| Started                              |                      | Date/Time   | ✓            |              |
| Wrapped                              |                      | Date/Time   | $\checkmark$ |              |
| Vrap-up Code Id                      |                      | Text        | ✓            |              |
| Vrap-up Code Name                    |                      | Text        | $\checkmark$ |              |
| Vrap-up Code Notes                   |                      | Text Area   | $\checkmark$ |              |
| Wrap-up Code Timeout                 |                      | Number      | ✓            |              |
| Wrap-up Code Type                    |                      | Text        | ✓            |              |

# Do the same thing with the $\mbox{ GCX Chat Transcript}$ :

|                      | Edit Back to Profile |              |              |
|----------------------|----------------------|--------------|--------------|
| Field Name           | Field Type           | Read Access  | Edit Access  |
| Body                 | Long Text Area       | ✓            |              |
| Chat Transcript Name | Text                 | <            | <            |
| Created By           | Lookup               | <            |              |
| Last Modified By     | Lookup               | ✓            |              |
| Owner                | Lookup               | $\checkmark$ | $\checkmark$ |

Similarly, do the same thing with the Email Experience object:

|                       | Edit Back to Profile |              |              |
|-----------------------|----------------------|--------------|--------------|
| Field Name            | Field Type           | Read Access  | Edit Access  |
| Account               | Lookup               | $\checkmark$ |              |
| Agent Id              | Text                 | $\checkmark$ |              |
| Case                  | Lookup               | $\checkmark$ |              |
| Completed             | Checkbox             | $\checkmark$ | 1            |
| Contact               | Lookup               | $\checkmark$ |              |
| Created By            | Lookup               | $\checkmark$ |              |
| Customer Id           | Text                 | $\checkmark$ |              |
| Ended                 | Date/Time            | $\checkmark$ |              |
| Experience Name       | Auto Number          | $\checkmark$ |              |
| Forwarded             | Date/Time            | $\checkmark$ |              |
| From                  | Text                 | $\checkmark$ |              |
| From Address          | Text                 | $\checkmark$ |              |
| Interaction Id        | Text                 | $\checkmark$ | $\checkmark$ |
| Last Modified By      | Lookup               | $\checkmark$ |              |
| Next Email Experience | Lookup               | $\checkmark$ |              |
| Owner                 | Lookup               | $\checkmark$ | $\checkmark$ |
| Previous Experience   | Lookup               | $\checkmark$ |              |
| Queue Id              | Text                 | $\checkmark$ |              |
| Queue Name            | Text                 | $\checkmark$ |              |
| Related Object        | Picklist             | $\checkmark$ |              |
| Responded             | Date/Time            | $\checkmark$ |              |
| Started               | Date/Time            | $\checkmark$ |              |
| Subject               | Text                 | $\checkmark$ |              |
| To Address            | Text                 | $\checkmark$ | $\checkmark$ |
| Wrapped               | Date/Time            | $\checkmark$ |              |
| Wrap-up Code Id       | Text                 | $\checkmark$ |              |
| Wrap-up Code Name     | Text                 | $\checkmark$ |              |
| Wrap-up Code Notes    | Text Area            | $\checkmark$ |              |
| Wrap-up Code Timeout  | Number               | $\checkmark$ |              |
| Wrap-up Code Type     | Text                 | ✓            |              |

## Email Experience Message object:

|                    | Edit Back to Profile |              |             |
|--------------------|----------------------|--------------|-------------|
| Field Name         | Field Type           | Read Access  | Edit Access |
| BCC Address        | Text                 | $\checkmark$ | ✓           |
| CC Address         | Text                 | $\checkmark$ | ✓           |
| Created By         | Lookup               | $\checkmark$ |             |
| EmailMessageId     | Text                 | $\checkmark$ | 1           |
| From Address       | Email                | $\checkmark$ | 1           |
| From Name          | Text                 | $\checkmark$ |             |
| HTML Body          | Long Text Area       | $\checkmark$ |             |
| Is Incoming        | Checkbox             | $\checkmark$ |             |
| Last Modified By   | Lookup               | $\checkmark$ |             |
| Message Date       | Date/Time            | $\checkmark$ |             |
| Message Identifier | Text                 | $\checkmark$ |             |
| Name               | Text                 | $\checkmark$ | ✓           |
| Owner              | Lookup               | $\checkmark$ | 1           |
| RelatedTold        | Lookup               | $\checkmark$ |             |
| Subject            | Text                 | $\checkmark$ |             |
| Text Body          | Long Text Area       | $\checkmark$ |             |
| To Address         | Text                 | 1            | 1           |

#### POST INSTALL STEPS

|                    | Edit Back to Profile |              |             |
|--------------------|----------------------|--------------|-------------|
| Field Name         | Field Type           | Read Access  | Edit Access |
| AttachmentId       | Text                 | $\checkmark$ |             |
| AttachmentName     | Text                 | $\checkmark$ |             |
| Content Length     | Number               | $\checkmark$ |             |
| Content Type       | Text                 | $\checkmark$ |             |
| Content URI        | Text                 | $\checkmark$ |             |
| Content Version Id | Text                 | $\checkmark$ |             |
| Created By         | Lookup               | $\checkmark$ |             |
| Is Inline          | Checkbox             | $\checkmark$ |             |
| Is Uploaded        | Checkbox             | $\checkmark$ |             |
| Last Modified By   | Lookup               | $\checkmark$ |             |
| Name               | Text                 | $\checkmark$ | ✓           |
| Owner              | Lookup               | $\checkmark$ | ✓           |
| RelatedTold        | Lookup               | $\checkmark$ |             |

#### Create the Service Presence Statuses

Note: In this section, if you use Genesys Cloud for Service Cloud Voice, you don't need to create new Service Presence Statuses, you just need to add the newly created Service Channel to the existing available statuses you want your agents to use when they process Genesys Cloud Chats.

Create, at least, the following Service Presence Statuses connected to the Genesys Cloud Messaging Service Channel you created in the previous step:

- Available
- Available on Queue
- Busy

On the Setup screen, search for Presence Statuses , click on New , and fill in the form:

| Let agents indicate when t                  | hey're online and available to red                                | ·   | fic service channel, or whether they're away or offline.          |
|---|---|---|---|
| Basic Information                           |   |   | = Required Information  |
| Status Name<br>Developer Name               | Available on Queue Available_on_Queue                             |   |   |
|   | ents are online or busy when the ppear away and indicate that the |   | ses let agents receive new work items. Busy statuses<br>rk items. |
| 👻 Service Channe                            | Is  |   |   |
| Select one or more s<br>channels you select |   | presence status. Agents logo  | ged into this presence status can receive work from the           |
| Available C                                 | Add Gen   | Selected Channels<br>esys Cloud Email<br>esys Cloud Messaging<br>saging<br>ne |   |

| Presence Statuses   |
|---|
| Let agents indicate when they're online and available to receive work items from a s  |
| Save  |
| Basic Information   |
| Status Name Busy Developer Name Busy  |
|   |
| Choose whether agents are online or busy when they use this status. Online indicate that they're unavailable to receive work items.  Online  Busy |
| Save  |

And finally the Available status:

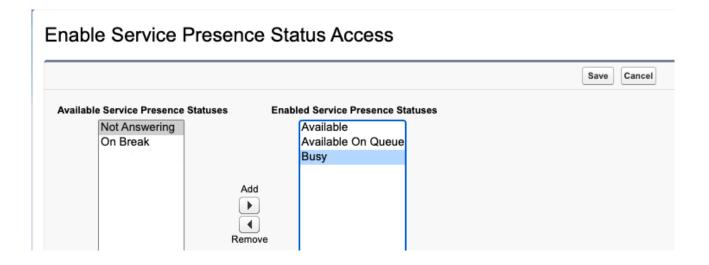
| Presence Statuses   |  |  |  |  |
|---|--|--|--|--|
| Let agents indicate when they're online and available to receive work items from a specific service channel, or whether they're away or offline.  |  |  |  |  |
| Save  |  |  |  |  |
| Basic Information = Required Information  |  |  |  |  |
| Status Name Available   |  |  |  |  |
| Developer Name Available  |  |  |  |  |
|   |  |  |  |  |
| - Status Options  |  |  |  |  |
| Choose whether agents are online or busy when they use this status. Online statuses let agents receive new work items. Busy statuses make your agents appear away and indicate that they're unavailable to receive work items.  Online Busy |  |  |  |  |
| ▼ Service Channels  |  |  |  |  |
| Select one or more service channels to assign to this presence status. Agents logged into this presence status can receive work from the channels you select.   |  |  |  |  |
| Available Channels Selected Channels  |  |  |  |  |
| Add<br>Add<br>Remove<br>Add<br>Genesys Cloud Email<br>Genesys Cloud Messaging<br>Phone  |  |  |  |  |

Assign the Presence Statuses to User Profiles

On the setup screen, search for Profiles and click on Profiles . Click on the profile the agents will use (do not click on the 'Edit' link).

|  | files   |  |
|--|---|--|
| Profiles                                     |   |  |
| All Profiles ~                               | Edit I Delete I Create New View   |  |
| New Profile                                  | 0   |  |
|  |   |  |
| Action                                       | Profile Name ↑  | User License   |
| Action     Edit   Clone                      |   | User License<br>Salesforce Integration                 |
| 0  | Salesforce API Only System Integrations   |  |
| Edit   Clone                                 | Salesforce API Only System Integrations<br>Silver Partner User                                      | Salesforce Integration                                 |
| Edit   Clone                                 | Salesforce API Only System Integrations<br>Silver Partner User<br>Solution Manager                  | Salesforce Integration<br>Silver Partner               |
| Edit   Clone<br>Edit   Clone<br>Edit   Clone | Salesforce API Only System Integrations Silver Partner User Solution Manager Standard Platform User | Salesforce Integration<br>Silver Partner<br>Salesforce |

Click on the Enabled Service Presence Status Access[0] link, and then on the Edit button, and add all the statuses you created in the previous step:



#### Create the Presence User Configuration

Create a Presence User Configuration for agents that will be handling Genesys Cloud chats, emails. You should set the capacity of your agents. For example, if you have 10 agents, and each agent can handle 5 chats at the same time, then you should set the Capacity to 50.

On the Setup screen, search for Presence Configurations , click on New , and fill in the form:

|  | Save              |            |
|--|-------------------|------------|
| <b>Basic Information</b>   | = Required In     | nformation |
| Presence Configuration<br>Name                                   | Experience Agents |            |
| Developer Name   | Experience_Agents |            |
| Capacity 😡   | 20                |            |
| Interruptible Capacity 😡   |                   |            |
| Automatically accept<br>work requests                            |                   |            |
| Allow agents to decline<br>work requests                         |                   |            |
| Update Status on  Decline  |                   |            |
| Allow agents to choose<br>a decline reason                       |                   |            |
| Update Status on Push i<br>Timeout                               |                   |            |
| Audio Settings   |                   |            |
| Play a notification sound<br>for work requests                   |                   |            |
| Notification Sound   | Default           |            |
|  | Custom sound      |            |
| Sound Length (Seconds) 😡   |                   |            |
|  | Maximum: 30       |            |
| Play a notification sound<br>if Omni Channel loses<br>connection |                   |            |
| After Conversation Wo  | rk Time           |            |
| Give agents wrap-up lo time after conversations                  |                   |            |

Assign the new Presence Configuration to agents and/or user profiles.

Notes:

- If you want to have your agents answering conversations automatically, you should configure the Presence Configuration in Salesforce and not set the queue to auto-answer in Genesys Cloud. Only agents that are mentioned in this conversation or member of the profile that is mentioned in the Presence Configuration will be able to automaticall answer.
- You can also use difference configurations for Chat, Voice and Email, etc. Some configurations would allow auto-answer for chats, but not for emails, for example. They could also use different alerts, capacities, etc.

Create a Routing Configuration

On the setup screen, search for Routing Configurations , and click on the New button.

| Routing Configurations  |
|---|
| The routing priority determines the order in which work items are pushed to agents. Higher priority work The routing model determines how to distribute work items to your agents. It acts as a tiebreaker if two between work item capacity and open work items. |
| Basic Information Routing Configuration Name Experiences  |
| Developer Name Experiences Overflow Assignee If you don't give the overflow as User   |
| Routing Settings  |
| The routing priority determines the order in which work items across your Omni-Channel queues get<br>The routing model determines how to evenly distribute work items to your agents. It acts as a tiebrea  |
| Routing Priority I<br>Routing Model I External Routing V<br>Push Time-Out (seconds) I   |
| Work Item Size  |
| Specify the size of the work items in the <u>queues</u> associated with this configuration. You can size item   |
| Percentage of Capacity  |

Create the flows

Create Backup Queues for the flows

On the setup screen, search for Queues , and click on the New button.

Create a Queue called Experiences that will deal with the Experience object and add the users/groups you desire as queue members. Also attach the Routing Configuration previously created.

| Queue Edit   |   |
|--|---|
| Queue Name and Email Address   |   |
| Enter the name of the queue and the email address to use wh  | en sending notifications (for example                   |
| Label  | Experiences   |
| Queue Name   | Experiences   |
| Queue Email  |   |
| Send Email to Members  |   |
| Configuration with Omni-Channel Routing  |   |
| If your organization uses Omni-Channel, you can link queues<br>Routing Configuration   | to a routing configuration. This will pu<br>Experiences |
| Supported Objects  |   |
| Select the objects you want to assign to this queue. Individual Available Objects Agent Work Alternative Payment Method  | Selected Objects  |
| Appointment Bundle Config<br>Appointment Bundle Policy<br>Attribute Definition<br>Attribute Picklist<br>Authorization Form<br>Authorization Form Consent<br>Authorization Form Data Use<br>Business Brand<br>Case<br>Change Request<br>GCX Chat Transcript<br>Communication Subscription | e   |
| Queue Members  |   |
| To add members to this queue, select a type of member, then those objects.   | choose the group, role, or user from                    |
| Search: Users v for:   | Find  |
| Available Members Selected Members   |   |
| User: Integration User<br>User: Security User  |   |

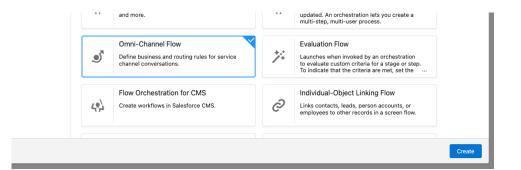
Create another queue called Email Experiences that will deal with the Email Experience object and add the users/groups you desire as queue members. Also attach the Routing Configuration previously created.

#### Create the Flow to route an Experience

On the setup screen, search for Flows and click on New Flow . Select All + Templates , Omni-Channel Flow and click on Create :

#### POST INSTALL STEPS

:



Adddanew Resource of type Variable called input\_record of type genesysps\_\_Experience\_\_c

|   | New Resource                       |
|---|------------------------------------|
| * Resource Type                         |                                    |
| Variable                                | <b>▼</b>                           |
| * API Name                              |                                    |
| input_record                            |                                    |
| Description                             |                                    |
| * Data Type                             | Allow multiple values (collection) |
| Record                                  |                                    |
| * Object<br>Experience                  |                                    |
| Availability Outside the Flow           |                                    |
| <ul> <li>Available for input</li> </ul> |                                    |
| Available for output                    |                                    |
|   | Cancel Done                        |

Note: Make sure to check the Available for input checkbox.

Addanew Resource of type Variable called recordId if type Text :

| New F   | Resource                           |
|---|------------------------------------|
| • Resource Type   |                                    |
| Variable  | •                                  |
| * API Name  |                                    |
| recordId  |                                    |
| Description   |                                    |
|   |                                    |
| • Data Type   |                                    |
| Text  | Allow multiple values (collection) |
| Default Value   |                                    |
| Enter value or search resources   | Q                                  |
| Availability Outside the Flow         Image: Available for input         Available for output |                                    |
|   | Cancel Done                        |

Note: Make sure to check the Available for input checkbox.

X

Q

Add a Route Work step called Route Experience to Queue after the Start step. Configure that step as follows:

| <b>≗</b> € | Edit Route Work                                       |  |
|------------|---|--|
|            | Route Experience to Queue (Route_Experience_to_Queue) |  |

| Single                  |   |
|-------------------------|---|
| Multiple                |   |
| * Record ID Variable    |   |
| {!input_record.ld}      |   |
| * Service Channel       |   |
| Genesys Cloud Messaging | × |
| * Route To              |   |
| Queue                   | • |
|                         |   |

#### The flow should look like this:

Use Variable
 \* Queue ID

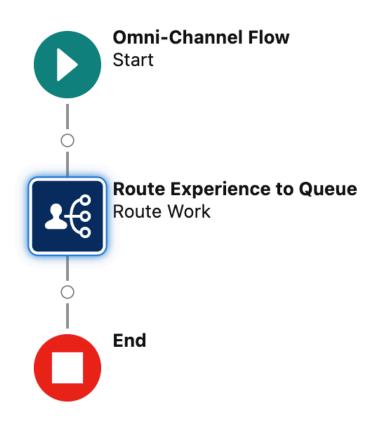
۲

MessagingExperiences

Set Additional Input Values

Search resources...

Screen Pop Collection Variable



Save it as Route Messaging Experience to Queue and activate the flow.

Create the Flow to start Omni-Channel Routing upon creating an Experience

On the setup screen, search for Flows and click on New Flow . Select Record-Triggered Flow and click on Create . Then, search for Experience as the triggering object. The Entry Conditions should be set to All Conditions are Met (AND) the condition set as follows:

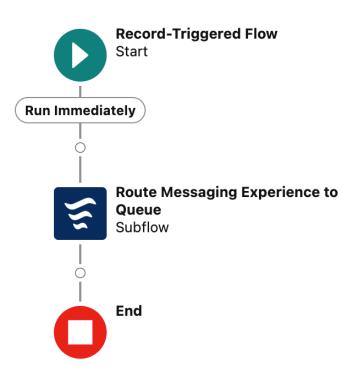
| Select Object   |  |                                 |  |
|---|--|---------------------------------|--|
| elect the object whose records trigger the flow when they're created, upd   | ated, or deleted.                          |                                 |  |
| Object  |  |                                 |  |
| Experience  |  |                                 |  |
| Configure Trigger   |  |                                 |  |
| Trigger the Flow When:  |  |                                 |  |
| A record is created   |  |                                 |  |
| A record is updated   |  |                                 |  |
| A record is created or updated  |  |                                 |  |
| A record is deleted   |  |                                 |  |
| Set Entry Conditions  |  |                                 |  |
| pecify entry conditions to reduce the number of records that trigger the fl | ow and the number of times the flow is e   | ecuted. Minimizing unnecessary  |  |
| ow executions helps to conserve your org's resources.                       |  |                                 |  |
| you create a flow that's triggered when a record is updated, we recomme     | nd first defining entry conditions. Then a | plact the Only when a record in |  |
| pdated to meet the condition requirements option for When to Run the        |  | elect the only when a record is |  |
| condition Requirements  |  |                                 |  |
|   |  |                                 |  |
| All Conditions Are Met (AND)  |  |                                 |  |
|   |  |                                 |  |
|   |  |                                 |  |
| Field   | Operator                                   | Value                           |  |

Add a Subflow step after the Start step:

| Record-Triggered Flow<br>Start<br>Run Immediately |
|---|
| Add Element                                       |
| Shortcuts   |
| Dpdate Triggering Record                          |
| Dpdate Related Records                            |
| Send Email Alert                                  |
| Interaction                                       |
| 4 Action  |
| Subflow   |
| End   |

And configure the subflow as follows:

| F                 | dit Subflow<br>Route Messaging Experience to Queue ( <i>Route</i><br>o_ <i>Queue)</i>   | _Messaging_Experience                    |
|-------------------|---|--|
| flow. B<br>of the | alues from the parent flow to set the inputs for the "Ro<br>y default, the parent flow stores all outputs. You can e<br>Subflow element or manually assign variables in the pa<br>oute Messaging Experience to Queue" flow. | ither reference outputs via the API name |
| Refer             | enced Flow  |  |
| ž                 | Route Messaging Experience to Queue   | Open Referenced Flow                     |
| Set Ir            | put Values  |  |
| Ē                 | input_record  |  |
|                   | {!\$Record}   | include                                  |
| A <sub>a</sub>    | recordId    (!\$Record.Id}  | Include                                  |



Save it as Start Omni-Channel for new Messaging Experience and activate the flow.

Create the Flow to pop an Email Experience to an agent

On the setup screen, search for Flows and click on New Flow . Select All + Templates , Omni-Channel Flow and click on Create :

|             | and more.  |    | updated. An orchestration lets you create a multi-step, multi-user process.  |        |
|-------------|--|----|--|--------|
| ٩           | Omni-Channel Flow<br>Define business and routing rules for service<br>channel conversations. | ** | Evaluation Flow<br>Launches when invoked by an orchestration<br>to evaluate custom criteria for a stage or step.<br>To indicate that the criteria are met, set the |        |
| 4 <u>0)</u> | Flow Orchestration for CMS<br>Create workflows in Salesforce CMS.                            | Q  | Individual-Object Linking Flow<br>Links contacts, leads, person accounts, or<br>employees to other records in a screen flow.                                       |        |
|             |  |    |  | Create |

Adddanew Resource of type Variable called input\_record of type genesysps\_\_EmailExperience\_\_c

|                               | New Resource                         |     |
|-------------------------------|--------------------------------------|-----|
| * Resource Type               |                                      |     |
| Variable                      |                                      | •   |
| * API Name                    |                                      |     |
| input_record                  |                                      |     |
| Description                   |                                      |     |
|                               |                                      |     |
|                               |                                      | _/; |
| * Data Type                   |                                      |     |
| Record                        | Allow multiple values (collection) 1 |     |
| * Object                      |                                      |     |
| Email Experience              |                                      |     |
| Availability Outside the Flow |                                      |     |
| Available for input           |                                      |     |
| Available for output          |                                      |     |
|                               | Cancel                               | e   |
|                               |                                      |     |

Note: Make sure to check the Available for input checkbox.

Addanew Resource of type Variable called recordId if type Text :

|  | New Resource                       |      |
|--|------------------------------------|------|
| * Resource Type  |                                    |      |
| Variable   |                                    | •    |
| * API Name   |                                    |      |
| recordId   |                                    |      |
| Description  |                                    |      |
| * Data Type<br>Text  | Allow multiple values (collection) | le   |
| Default Value  |                                    |      |
| Enter value or search resources  |                                    | Q    |
| Availability Outside the Flow       ✓       Available for input       Available for output |                                    |      |
|  | Cancel                             | Done |

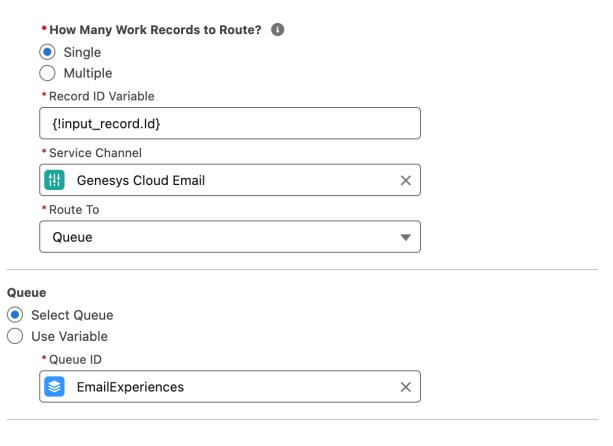
Note: Make sure to check the Available for input checkbox.

Add a Route Work step called Route to Agent after the Start step. Configure that step as follows:

# 🔏 Edit Route Work

Route Experience to Queue (Route\_Experience\_to\_Queue)

## Set Input Values



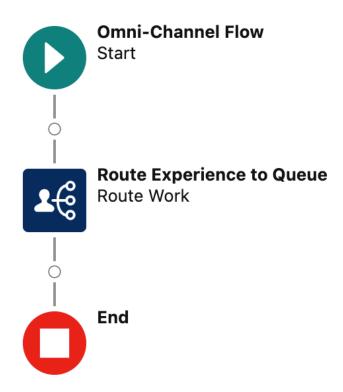
Q

## Set Additional Input Values

Screen Pop Collection Variable

Search resources...

×

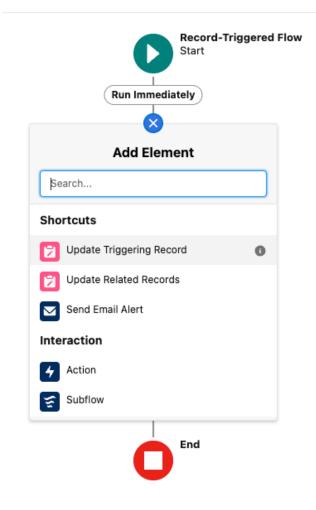


Save it as Route Email Experience to Agent and activate the flow.

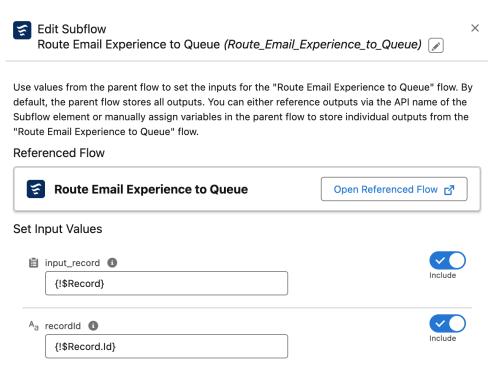
Create the Flow to route the Email Experience to an agent

On the setup screen, search for Flows and click on New Flow . Select Record-Triggered Flow and click on Create . Then, search for Email Experience as the triggering object. The Entry Conditions should be set to All Conditions are Met (AND) the condition set as follows:

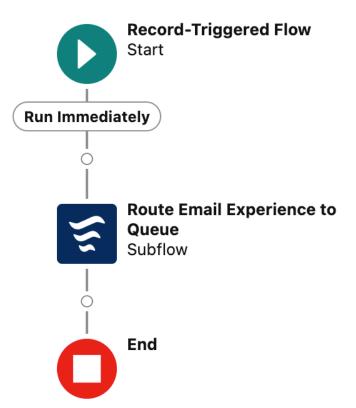
| Select Object  |   |
|--|---|
| Select the object whose records trigger the flow updated, or deleted.  | when they're created,   |
| * Object   |   |
| Email Experience   |   |
| Configure Trigger  |   |
| Trigger the Flow When:   |   |
| A record is created  |   |
| A record is updated  |   |
| A record is created or updated   |   |
| A record is deleted  |   |
| Set Entry Conditions   |   |
| Specify entry conditions to reduce the number of<br>executed. Minimizing unnecessary flow execution<br>f you create a flow that's triggered when a record<br>he <b>Only when a record is updated to meet the</b><br>Records.                           | of records that trigger the flow and the number of times the flow is<br>ns helps to conserve your org's resources.<br>rd is updated, we recommend first defining entry conditions. Then select<br><b>e condition requirements</b> option for When to Run the Flow for Updated |
| specify entry conditions to reduce the number of xecuted. Minimizing unnecessary flow execution f you create a flow that's triggered when a record he <b>Only when a record is updated to meet the</b> tecords.  | ns helps to conserve your org's resources.<br>rd is updated, we recommend first defining entry conditions. Then select  |
| pecify entry conditions to reduce the number of<br>xecuted. Minimizing unnecessary flow execution<br>you create a flow that's triggered when a record<br>he <b>Only when a record is updated to meet the</b><br>lecords.                               | ns helps to conserve your org's resources.<br>rd is updated, we recommend first defining entry conditions. Then select  |
| Specify entry conditions to reduce the number of<br>executed. Minimizing unnecessary flow execution<br>f you create a flow that's triggered when a record<br>he <b>Only when a record is updated to meet the</b><br>Records.<br>Condition Requirements | ns helps to conserve your org's resources.<br>rd is updated, we recommend first defining entry conditions. Then select<br>a <b>condition requirements</b> option for When to Run the Flow for Updated   |



#### And configure the subflow as follows:



The flow should look like this:



Save it as Start Omni-Channel for new Email Experience and activate the flow.

#### Create a new Record Page for the Experience

On the setup screen, search for Lightning App Builder and click on New to create a new Record Page for the Experience object called "Experience Record Page". And add the various Components you desire.

For an optimal experience, we recommend the following components:

- Genesys Cloud Chat This component shows the active chat conversation as well as the transcript once the chat has been disconnected.
- Genesys Cloud Chat Controls This component is used to control the active chat (disconnect, transfer, etc.)
- Genesys Cloud Einstein Assist
   This component transmits the chat text to Einstein's Next Best Action. It can be added to the Experience
   Record Page or to the Utility Bar (not both).

3 more components are available:

- Genesys Cloud Chat Bar Utility This component is used in the Utility Bar (where Omni-Channel shows) and should not be added to the Record page.
- Genesys Cloud Transcript
   This component is used to see the transcript of a voice or chat conversation. It is not used on the Experience Record page, it can rather be used on a Voice Record page, for example.
- Genesys Cloud Responses
   This component is used to show the canned responses available in Genesys Cloud to the agent.
   Canned responses will be available when the agent is logged in.
   It works for both Chat and Email.

Here is an example of what the page could look like:

| Experience<br>EX-00655            |  | New Contact New Event New Task 🔻                                       |
|-----------------------------------|--|--|
| Contact Case Intent<br>Hello sam1 |  |  |
| Related <b>Details</b>            | INTERACTION has joined the conversation        | Genesys Interaction Management   |
| ✓ Information                     | ↑  | Focus Time: 00:00:00   |
| Experience Name                   | Genesys Cloud Chat Genesys Cloud Chat Controls | Filters: All time - All activities - All types                         |
| Completed                         |  | Refresh • Expand All • View All  |
| Completed                         |  | V Upcoming & Overdue No activities to show.                            |
| Owner                             |  | Get started by sending an email, scheduling a task, and more.          |
|                                   |  | No past activity. Past meetings and tasks marked as done show up here. |
| Contact et                        | Genesys Cloud Einstein Assist                  | 0 + â  |
| Account                           |  | + *  |
| Account                           |  | Next Best Action   |
| Case 🖉                            |  | Einstein doesn't have any recommendations for you right now.           |

#### Create a new Record Page for the Email Experience

On the setup screen, search for Lightning App Builder and click on New to create a new Record Page for the Email Experience object called "Email Experience Record Page". And add the various Components you desire.

For an optimal experience, we recommend the following components:

- Genesys Cloud Email
- This component shows the active email conversation.
- Genesys Cloud Email Controls This component is used to control the active email (disconnect, transfer, etc.)

Here is an example of what the page could look like:

| Email Experience<br>EEX-00014                              | 9/10 <i>72 1117</i> 2, AMB (1.                         | New Contact Edit  | New Opportunity       |
|--|--|---|-----------------------|
| Contact  | Subject<br>Email Test                                  | Case  |                       |
|  |  |   |                       |
| Experience Name<br>EEX-00014                               | Owner  | Genesys Interaction Management  |                       |
| Interaction Id<br>6825e754-128b-4a4d-<br>a536-c396c5eaf5b4 |  | CX Interaction Time::<br>Agent Interaction Time::                           |                       |
| Created By<br><u>User User</u> ,<br>1/28/2024, 7:28 PM     | Last Modified By<br>S User User,<br>1/28/2024, 7:28 PM |   |                       |
|  |  | [Genforce] Email Test #26   | $(*) (*) \rightarrow$ |
|  |  | <ul> <li>✓ ▲1/29/2024, 12:28:39 PM, ▲100</li> <li>From ▲12:28 PM</li> </ul> | Jan 28, 2024          |
|  |  | To Jiminy Cricket <   |                       |
|  |  | Hello!  |                       |
|  |  |   |                       |
|  |  |   |                       |
|  |  |   |                       |
|  |  |   |                       |

## Configure a Lightning App for the Experience

Log on your Genesys Cloud console with an Administrator account and create a Token Implicit Grant :

| ■ Integrations / OAuth / Sa | lesforce  |
|-----------------------------|---|
| Integrations                | Client Details  |
| Actions                     | App Name  |
| Single Sign-on              | Salesforce  |
| OAuth                       | Description   |
| Authorized Applications     |   |
|                             | Token Duration (seconds): the number of seconds, between 5mins and 48hrs, until tokens created with this client expire. |
|                             | 86400   |
|                             | Grant Types   |
|                             | $\bigcirc$ Client Credentials   |
|                             | ○ Code Authorization  |
|                             | Token Implicit Grant (Browser)  |
|                             | ○ SAML2 Bearer  |
|                             | Authorized redirect URIs (one per line)   |
|                             |   |

#### Notes:

- The Token Duration must be longer than the shift of your agents.
- The scopes for the OAUTH implicit grant should be:

- conversations,
- notifications,
- presence,
- response-management:readonly (if you plan to use Canned Responses),
- routing:readonly,
- upload .
- users
- · The permissions for the agents should be:
  - conversation:communication:blindTransfer,
  - conversation:message:create ,
  - conversation:message:view ,
  - conversation:participant:wrapup ,
  - conversation:webmessaging:create ,
  - conversation:webmessaging:view ,
  - directory:user:view ,
  - externalContacts:contact:view ,
  - responses:library:view , (if you plan to use Canned Responses)
  - responses:response:view , (if you plan to use Canned Responses)
  - routing:queue:search ,
- Do not forget to add your Salesforce redirect URI to the list of allowed redirect URIs in the Genesys Cloud OAUTH configuration. That URL should be something like this:

https://xxxx.lightning.force.com/lightning/page/home

where xxxx is the base name of your org. You can find that name in the URL of your Salesforce org:

| ;   | genesys-1d7-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home |                  |   |              |  |  |  |
|-----|--|------------------|---|--------------|--|--|--|
|     |  |                  |   |              |  |  |  |
|     |  |                  | Q | Search Setup |  |  |  |
| tup | <u>Home</u>  | Object Manager 🗸 |   |              |  |  |  |
|     |  |                  |   | $\sim 1200$  |  |  |  |

In this example, the basename is genesys-1d7-dev-ed.develop , so the redirect URI in Genesys Cloud should be set to:

https://genesys-1d7-dev-ed.develop.lightning.force.com/lightning/page/home

Back on the Salesforce pages, on the setup screen, search for the<br/>Lightning apps (you can also create your own), here we will use the<br/>create your own Lightning app. Click on the<br/>Edit<br/>button:App Manager<br/>Service Console<br/>app, you can also<br/>app, you can also

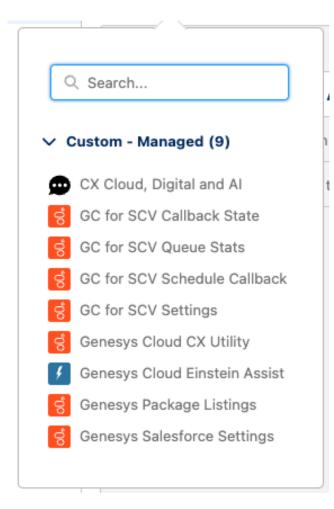
#### CX CLOUD, DIGITAL AND AI FOR SALESFORCE SERVICE CLOUD INSTALLATION

| Q App Manager                        |         | SETUP                   | <b>.</b>              |                                | New Lightning App      | New Co        | onnected     | Арр |
|--------------------------------------|---------|-------------------------|-----------------------|--------------------------------|------------------------|---------------|--------------|-----|
| Apps                                 |         | Lightning Exp           | perience App          | Manager                        |                        |               |              |     |
| App Manager                          |         |                         |                       |                                |                        | ~ ~ `     ) ~ |              |     |
| Didn't find what you're looking for? | 14 iter | ms • Sorted by App Name | • Filtered by All app | menuitems - TabSet Type        |                        |               |              | ¢ - |
| ry using Global Search.              |         | App Name 🕇 🛛 🗸          | Developer $\vee$      | Description $\lor$             | Last Modified $ \lor $ | App $\lor$    | Vi ~         |     |
|                                      | 1       | All Tabs                | AllTabSet             |                                | 8/22/2023, 9:16 PM     | Classic       |              | ▼   |
|                                      | 2       | App Launcher            | AppLauncher           | App Launcher tabs              | 8/22/2023, 9:16 PM     | Classic       | $\checkmark$ |     |
|                                      | 3       | Bolt Solutions          | LightningBolt         | Discover and manage busines    | 8/22/2023, 9:16 PM     | Lightning     | $\checkmark$ |     |
|                                      | 4       | Community               | Community             | Salesforce CRM Communities     | 8/22/2023, 9:16 PM     | Classic       | ~            |     |
|                                      | 5       | Content                 | Content               | Salesforce CRM Content         | 8/22/2023, 9:16 PM     | Classic       | $\checkmark$ |     |
|                                      | 6       | Digital Experiences     | SalesforceCMS         | Manage content and media fo    | 8/22/2023, 9:16 PM     | Lightning     | $\checkmark$ |     |
|                                      | 7       | Marketing               | Marketing             | Best-in-class on-demand mar    | 8/22/2023, 9:16 PM     | Classic       | ~            |     |
|                                      | 8       | Platform                | Platform              | The fundamental Lightning Pl   | 8/22/2023, 9:16 PM     | Classic       |              |     |
|                                      | 9       | Sales                   | Sales                 | The world's most popular sale  | 8/22/2023, 9:16 PM     | Classic       |              |     |
|                                      | 10      | Sales                   | LightningSales        | Manage your sales process wi   | 8/22/2023, 9:19 PM     | Lightning     | ~            |     |
|                                      | 11      | Salesforce Chatter      | Chatter               | The Salesforce Chatter social  | 8/22/2023, 9:16 PM     | Classic       | ~            |     |
|                                      | 12      | Service                 | Service               | Manage customer service wit    | 8/22/2023, 9:16 PM     | Classic       | $\checkmark$ |     |
|                                      | 13      | Service Console         | LightningService      | (Lightning Experience) Lets s  | 8/22/2023, 10:37 P     | Lightning     | ~            | F   |
|                                      | 14      | Site.com                | Sites                 | Build pixel-perfect, data-rich | 8/22/2023, 9:16 PM     | Classic       | Edit         |     |

In the Lightning App Builder, click on the Navigation Items tab, and add the Experiences and Email Experiences to the right column (Seleted Items):

| Available Items          | C <sup>1</sup> Create <b>v</b> | Selected Items |
|--------------------------|--------------------------------|----------------|
| Q experiences            | $\otimes$                      | Gases          |
| Digital Experiences Home |                                | E Contacts     |
| Email Experiences        |                                | Counts         |
| Experiences              |                                | Reports        |
|                          |                                | O Dashboards   |
|                          |                                |                |

In the Lightning App Builder, click on the Utility Items tab, and add the CX Cloud, Digital and AI component:



Fill in the Component Properties with the region of your Genesys Cloud Organization and the client ID of your Genesys Cloud OAuth Implicit Grant. Also pick what Salesforce Presence Status should be used for Available and Available on Queue:

|                          | PROPERTIES<br>CX Cloud, Digital and Al  |
|--------------------------|---|
| CX Cloud, Digital and Al |   |
| History                  | ✓ Utility Item Properties   |
| Notes                    | * Label   |
|                          | CX Cloud, Digital and Al  |
|                          | Icon  |
|                          | ✓ fallback ×  |
|                          | Panel Width   |
|                          | 340   |
|                          | Panel Height  |
|                          | 480   |
|                          | Start automatically   |
|                          |   |
|                          | No C  |
|                          | No     C       * Genesys Cloud Region     C       Americas (US West)     C  |
|                          | * Genesys Cloud Region  |
|                          | Genesys Cloud Region     Americas (US West)   |
|                          | Genesys Cloud Region     Americas (US West)     Genesys Cloud Implicit Grant Client Id  |
|                          | Genesys Cloud Region     Americas (US West)     Genesys Cloud Implicit Grant Client Id     Available Presence Status  |
|                          | Genesys Cloud Region     Americas (US West)     Genesys Cloud Implicit Grant Client Id     Available Presence Status     Available     C  |
|                          | Genesys Cloud Region     Americas (US West)     Genesys Cloud Implicit Grant Client Id     Available Presence Status     Available     Available     On Queue Presence Status   |
|                          | Genesys Cloud Region     Americas (US West)     Genesys Cloud Implicit Grant Client Id     Available Presence Status     Available     Available On Queue Presence Status     Available On Queue     C                      |
|                          | Genesys Cloud Region     Americas (US West)     Genesys Cloud Implicit Grant Client Id     Available Presence Status     Available     Available On Queue Presence Status     Available On Queue     Co     Tab name format |

You can also change the label to your liking.

Notes:

- Do not forget to check the Start Automatically box.
- If you have installed and will use CX Cloud, Voice for Salesforce Cloud Voice, select Yes to the question: "Is CX Cloud, Voice for Salesforce Cloud Voice installed?". You can choose any status in the latter fields, they will not be used by CX Cloud, Digital and AI for Salesforce Cloud Voice. You can also install it and not use it for specific lightning apps.
- The 'Tab name format' will be used to name the tabs containing Experiences. Firstname and Lastname come from the Participant Data associated with the Experience.
- You can also opt out of creating/linking incoming Experiences to Salesforce Contacts by selecting 'No' for 'Should Contacts be created or linked on incoming Experiences?'.

If you didn't add Geneys Cloud Einstein Assist on your Experience Record Page, you should add it here in the Utility Items (remember, don't add it in both places):

| App Settings                 |            | Utility Items (Desktop O               |
|------------------------------|------------|--|
| App Details & Branding       |            | Give your users quick access to p      |
| App Options                  |            |  |
| Utility Items (Desktop Only) |            | Add Utility Item                       |
| Navigation Items             |            |  |
| Navigation Rules             | Q          | Search                                 |
| User Profiles                |            | /isualforce                            |
|                              |            | <b>stom (0)</b><br>Iponents available. |
|                              | ∨ Cu       | stom - Managed (4)                     |
|                              | <b>D</b> 0 | X Cloud, Digital and Al                |
|                              | 4 0        | Genesys Cloud Einstein Assist          |
|                              | 4 0        | Genesys Cloud for Salesforce Pa        |
|                              | <b>f</b> 0 | Genesys Cloud for Salesforce Se        |

| Page > Genesys Cloud Einstein As   |       |
|--|-------|
| Trained Modelld (1)  |       |
| Email ID 🚯   |       |
| Private Key  Private Key Priva | QIBAE |
| Contact Center Name  |       |
| vttesting  | Q     |
| Use Last Utterance for NBA?  | 0     |
| No   | Q     |

**Component Properties:** 

- Trained Model ID (deprecated): Specifies the trained model for Einstein Assistant's Knowledge Articles. May not be needed for other GCEA features, such as Real-Time Voice Transcription and NBA strategy activation. If a value is obligatory, placeholder text is acceptable.
- Email ID (deprecated): Associates an email with your Einstein Assistant for Knowledge Articles. It's not always needed for other features; a placeholder may be used if necessary.
- Private Key : Provides a secure means of authenticating and ensuring data integrity between Salesforce and Genesys. The RSA private key, usually shared with Genesys for SCV setup, should be pasted here. It's a lengthy alphanumeric code that typically starts with "--BEGIN RSA PRIVATE KEY--" and ends with a corresponding "--END RSA PRIVATE KEY--" tag.
- Contact Center Name : Designates which contact center within Genesys the Salesforce integration should point to. Select the interaction name from the dropdown.
- Use Last Utterance for NBA? : When the option "Yes" is selected for Next Best Action, the last customer utterance will be utilized. Conversely, if the option is not selected, the last utterance will not be used.

#### Einstein Next Best Action Integration in Salesforce

#### Key Components:

- Strategy Development for Recommendations: Crafting an effective strategy is crucial to tailor recommendations that align with business goals and customer needs. This involves analyzing customer data and behaviors to generate personalized and contextually relevant suggestions.
- Implementation of Suggested Actions: After developing a strategy, the next step is to implement actionable suggestions. These actions are designed to enhance customer engagement and decision-making processes, leveraging the predictive power of Einstein to deliver optimal recommendations at the right moment.

#### **Create Recommendations**

Recommendations in Salesforce are treated as standard records, much like accounts and contacts. These recommendation records are processed by strategies and linked to flows. The role of strategies is to decide which recommendation records should be surfaced. This is achieved through the use of business rules, predictive models, and various data sources. The outcome of this process yields recommendations tailored to specific contexts, enabling you to present them to users.

Follow the steps to Create Recommendations.

Create a Recommendation Strategy for Einstein's Next Best Action

On the setup screen, search for Process Automation . Click on Next Best Action and create a new strategy. For Voice and Messaging, two different strategies should be created.

Using Flow Builder

- Go to Setup and use the Quick Find box to search for "Flows". Select 'Flows' and then click 'New Flow'.
- In the 'Templates' tab, choose 'Recommendation Strategy' as the flow type and click 'Create'.
- To load the desired records for your recommendation, add a 'Get Records' element to the flow. Set a label and an API name.

| Edit Get Records<br>Get Experience (Get_Experience) 🖉                                  | >        |
|--|----------|
| Get Records of This Object   |          |
| *Object  |          |
| Experience   |          |
| Filter Experience Records  |          |
| Condition Requirements   |          |
| All Conditions Are Met (AND)   |          |
|  |          |
| Field Operator Value   |          |
| Id Equals V Aa recordid X  | <b>a</b> |
|  |          |
| + Add Condition  |          |
| Sort Experience Records  |          |
|  |          |
| Sort Order   |          |
| Not Sorted   If you store only the first record, filter by a unique field, such as ID. |          |
|  |          |
| How Many Records to Store  |          |
| Only the first record  |          |
| ○ All records  |          |
| How to Store Record Data   |          |
| Automatically store all fields   |          |
| O Choose fields and let Salesforce do the rest   |          |
| <ul> <li>Choose fields and assign variables (advanced)</li> </ul>                      |          |

- Choose the Experience object.
- In the 'Filter' section, define conditions to filter the records from your chosen object for the strategy.
- Add another 'Get Records' element to bring a specific recommendation into your strategy. Again, set a label and an API name.
- · Select the 'Recommendations' object.
- Use conditions in the 'Filter' section to specify the particular recommendation you wish to use.
- Incorporate additional flow elements as necessary to complete your strategy.
- To make the recommendation available in an Einstein Next Best Action component, add an 'Assignment' element.
- · For the 'Variable', choose 'outputRecommendations'.
- Set the 'Operator' to 'Equals' and the 'Value' to your predefined recommendation.
- Save the flow.



• Finally, activate your flow.

#### Select Continue in Strategy Builder

| tion  | New Strategy  |
|---|---|
| low Duilder, the future of low-code automation, you can do most things in Strategy Builder—and morel Sales<br>building automation in Flow Builder.                                    | force plans to retire Strategy Builder and recommends <u>Try.Elson Builder</u>  |
| Try Flow Builder  |   |
| Flow Builder is the future of low-code automation. You can use it to create most of the automation you<br>build in Strategy Builder. Start using Recommendation Strategy flows today! | creating recommendation records. Then design a strategy that evaluates  |
| Continue in Strategy Builder Create in Flow Builder   | commendations.  |
|   | building accountions in the buildon<br>Try Flow Builder<br>Flow Builder Allow of the cable actionation you<br>build in Strategy Buildin: Start caing Recommendation Strategy from today |

For VoiceCall: Select the VoiceCall Object.

|                                    | New Strategy |
|------------------------------------|--------------|
| * Name                             | * API Name   |
| Voice Strategy                     | Voice        |
| Description                        |              |
| Object Where Recommendations Displ | lay <b>O</b> |
| Voice Call                         |              |
| Template 🕕                         |              |

For Messaging: Select the Experience Object.

| *Name  | * API Name         |
|--|--------------------|
| Messaging_Strategy                                       | Messaging_Strategy |
|  |                    |
| escription   |                    |
| escription   |                    |
| Description  |                    |
| Description  |                    |
| Description  |                    |
|  | Direlay            |
| Description<br>Dbject Where Recommendation<br>Experience | Display 🕚          |

Workflow Example :



Load List Recommendations: Begin by importing or inputting a list of recommendations into the system.

Object: Defines the source from which recommendations will be pulled. Value: "Recommendation"

Field:

Purpose: Select the specific field from the recommendation records that will be evaluated. Input Type: Dropdown Value: "Description" or "Name"

*Operator*: Purpose: Specifies the relationship between the Field and Value. Input Type: Dropdown Example Value: "Contains"

*Value*: Purpose: The content against which the Field will be evaluated based on the Operator. Input Type: Text Example Value: "reset password" (preferable lower case)

Add Condition: Button to add more filter conditions.

|   | Edit Load                            |   |
|---|--------------------------------------|---|
| Label   | * API Name                           |   |
| List Recommendations  | List_Recommendations                 |   |
| escription  |                                      |   |
|   |                                      |   |
|   |                                      | 6 |
| elect Recommendation Source   |                                      |   |
| viet 0  |                                      |   |
| Recommendation  |                                      |   |
|   |                                      |   |
| ilter Recommendation Records  |                                      |   |
| ilter Recommendation Records<br>and tion Requirements<br>All Conditions are Met * |                                      |   |
| and tion Requirements   | Opener Wia                           |   |
| and tion Requirements<br>All Conditions are Met 🔹 👻                               | Commin Wile<br>Commin V Here passood | â |
| All Conditions are Met   Fiel  Description  |                                      | Ť |
| and tion Requirements<br>All Conditions are Met                                   |                                      | â |
| All Conditions are Met   Fiel  Description  |                                      | Î |
| All Conditions are Met    All Conditions are Met                                  |                                      | â |
| Al Conformants Al Conformants  free free free free free free free fr              | Contains • Real passoon              | â |
| All Conditioner an Net    All Conditioner an Net                                  | Contrain V rest parmood              | â |

Branch Selector (Filter by utterance): Evaluate user input (e.g., Last utterance) and determine the appropriate branch or recommendation logic to follow.

Resource:

Purpose: Identifies the specific data point or resource that will be evaluated. Input Type: Dropdown Example Value: "\$Record.genesysps\_Last\_utterance"

*Operator*: Purpose: Specifies the relationship between the Resource and Value. Input Type: Dropdown Example Value: "Contains"

Value: Purpose: The content against which the Resource will be evaluated based on the Operator. Input Type: Text Example Value: "password"

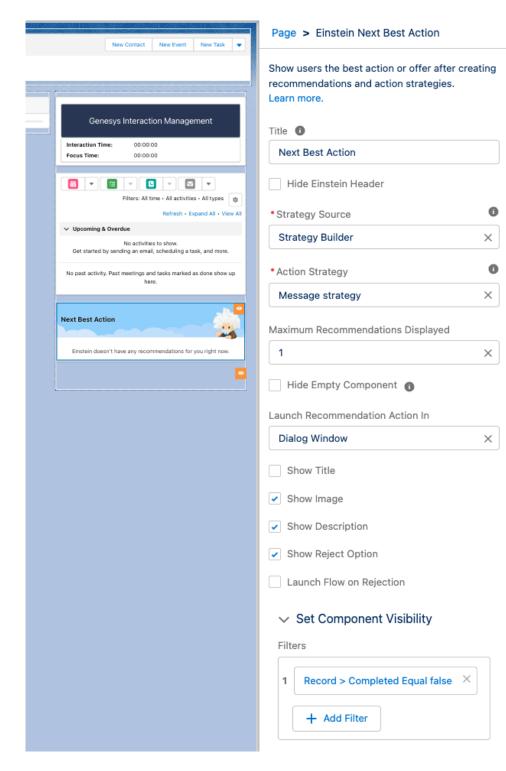
Add Condition: Button to incorporate additional filter conditions.

| Add conditions to branches. When the cond  | ition is true, the recommendatio     | is in the branch move forward | 1.                     |  |
|--|--------------------------------------|-------------------------------|------------------------|--|
| *Label   |                                      | * API Name                    |                        |  |
| Filter by utterence  |                                      | Filter_by_utterence           |                        |  |
| Description  |                                      |                               |                        |  |
|  |                                      |                               |                        |  |
|  |                                      |                               |                        |  |
| Settings   |                                      |                               |                        |  |
| Evaluate each branch in order, starting at th  | a top of the capute and moving       | lown Prancher that meet the   | conditions are allowed |  |
| cranate each pranch in order, starting at th   | e top of the canvas and moving       |                               | conditions are anowed. |  |
|  |                                      |                               |                        |  |
| Only allow recommendations from the first  | branch that meets the conditions     |                               |                        |  |
| Only allow recommendations from the first  |                                      |                               |                        |  |
| Branch 1: List Recommendati  | ons                                  |                               |                        |  |
|  | ons                                  |                               |                        |  |
| Branch 1: List Recommendati  | ons                                  |                               |                        |  |
| Branch 1: List Recommendati<br>Recommendations from branch 1 are<br>Standard Advanced  | ons                                  |                               |                        |  |
| Branch 1: List Recommendati<br>Recommendations from branch 1 are<br>Standard Advanced<br>When to Execute Filter  | ons<br>allowed when this condition i |                               |                        |  |
| Branch 1: List Recommendati<br>Recommendations from branch 1 are<br>Standard Advanced  | ons                                  |                               |                        |  |
| Branch 1: List Recommendati<br>Recommendations from branch 1 are<br>Standard Advanced<br>When to Execute Filter<br>All Conditions Are Met  | ons<br>allowed when this condition i | true.                         |                        |  |
| Branch 1: List Recommendati<br>Recommendations from branch 1 are<br>Standard Advanced<br>When to Execute Filter<br>All Conditions Are Met<br>Besource                            | ns<br>allowed when this condition i  | true.                         |                        |  |
| Branch 1: List Recommendati<br>Recommendations from branch 1 are<br>Standard Advanced<br>When to Execute Filter<br>All Conditions Are Met  | ns<br>allowed when this condition i  | true.                         | 1                      |  |
| Branch 1: List Recommendati<br>Recommendations from branch 1 are<br>Standard Advanced<br>When to Execute Filter<br>All Conditions Are Met<br>Besource                            | ns<br>allowed when this condition i  | true.                         | 5                      |  |
| Branch 1: List Recommendation<br>Recommendations from branch 1 are<br>Standard Advanced<br>When to Execute Filter<br>All Conditions Are Met<br>Resource<br>Stecordgenesysps_Last | ns<br>allowed when this condition i  | true.                         | ĩ                      |  |
| Branch 1: List Recommendation<br>Recommendations from branch 1 are<br>Standard Advanced<br>When to Execute Filter<br>All Conditions Are Met<br>Resource<br>Stecordgenesysps_Last | ns<br>allowed when this condition i  | true.                         | g                      |  |

Save the Strategy

In the VoiceCall or Experience page, add an Einstein Next Best Action component and set its Action Strategy to the Recommendation Strategy you just created:

#### POST INSTALL STEPS



#### Genesys Cloud for Real Time Voice Transcription

To add a Real Time Voice Transcription Component to a voice call record page in Salesforce, you would typically use Lightning App Builder. Here are the steps to do so:

- · Go to Setup in Salesforce.
- In the Quick Find box, enter "Lightning App Builder."
- · Click "Lightning App Builder" under User Interface.
- In the Lightning App Builder, select the VoiceCall record page
- · In the App Builder, add the following components:
  - Enhanced Conversation (Standard Salesforce Component)
  - Genesys Cloud CX Voice Transcript
  - Genesys Cloud Einstein Assist (Ignore if it's added in omni-channel utility)

| 고))~것 \=                         |   | 501-2)                    |                      |   |                 |
|----------------------------------|---|---------------------------|----------------------|---|-----------------|
| Voice Call<br>+91 44 69          | 25 8000   | lew Contact New Oppor     | tunity New Case 👻    | Next Best Action                                |                 |
| elated Record                    | Call Started<br>10/28/2023, 3:20 AM             | Call Duration<br>00:02:18 | Call Type<br>Inbound | Einstein doesn't have any reco<br>you right nov |                 |
| No recording                     | is available.<br>play call recordings and see o | all state here            |                      | Conversation                                    |                 |
| four de able to                  | play can recordings and see o                   | an stats nere.            |                      | Conversation Starte                             | 4 - 459 044     |
| Details F                        | eed Related                                     |                           |                      |   |                 |
|                                  |   |                           | /                    | Conversations will                              |                 |
| v Detaik                         |   |                           | Enhance              | ed Conversation                                 |                 |
|                                  |   |                           | Linance              | a conversation                                  | show up here.   |
| Caller Number                    |   | Call 7/pe                 |                      |   | Agent + 5:23 PM |
| +91 44 6925 8000                 |   | Inbound                   |                      |   |                 |
| Owner Name                       |   | Call Status               |                      |   |                 |
| 🖰 User User                      |   | completed                 |                      |   |                 |
| Call Started                     |   | Recipient Number          |                      |   |                 |
| 10/28/2023, 3:20 A               | м   | Praveen Kasturi           |                      |   |                 |
| Call Entered Queue               |   | Previous Call             |                      |   |                 |
| Call Accepted                    |   | Next Call                 |                      |   |                 |
|                                  | м   |                           |                      |   |                 |
| 10/28/2023, 3:20 A               |   | Cell Duration             |                      | -   | +               |
| 10/28/2023, 3:20 A<br>Call Ended |   |                           |                      |   |                 |

Verify that voice transcription is enabled at both the organization level and the queue level in Configure voice transcription

The real-time voice transcription functions through the Voice Call object, sending the transcript to Salesforce for display on the user interface. It is essential to configure the correct private key for this operation; note that this is not the Einstein private key, but rather the one specifically for setting up the Service Cloud Voice integration. Additionally, ensure you select the appropriate contact center. For access to the remote site settings, proceed with the following steps.

Navigate to Setup -> Quick Find -> Security -> Remote Site Settings -> New Remote Site

| Q, remote  | SET D                |  |                               |   |               |
|--|----------------------|--|-------------------------------|---|---------------|
| ✓ Custom Code  | K                    | emote Site Setting   | js                            |   |               |
| Security <u>Remote Site Settings</u>                             | Below is the I       | note Sites<br>ist of Web addresses that your<br>Remote Sites |                               | esforce.com. To add another Web address, click New Remote Site. |               |
|  |                      |  |                               | New Remot   | 4- 014-       |
|  | Action               | Remote Site Name +   | Namespace Prefix              | Remote Site URL   | te Site Activ |
|  | Action<br>Edit   Del | Remote Site Name +<br>ApexDevNet                             | Namespace Prefix<br>genesysps | Remote Site URL http://www.apexdevnet.com                       |               |
| Didn't find what you're looking for?<br>Try using Global Search. |                      |  |                               |   | te Site       |

To modify your Salesforce domain URL and replace "lightning.force.com" with ".my.salesforce-scrt.com", follow these steps:

Identify Your Current Domain URL: Make sure you know your current Salesforce domain URL. It will look something like this: https://saas-data-524-dev-ed.scratch.lightning.force.com.

Extract Domain Prefix: From the URL, extract the domain prefix. For the example URL provided, the domain prefix is saas-data-524-dev-ed.scratch.

Modify The Domain URL: Replace "lightning.force.com" with ".my.salesforce-scrt.com". Using the extracted domain prefix, your new URL will look like this: https://saas-data-524-dev-ed.scratch.my.salesforce-scrt.com.

| Remote Site Settings  |   |  |  |  |  |  |  |  |  |
|---|---|--|--|--|--|--|--|--|--|
| Remote Site Edit<br>Enter the URL for the remote site. All s-controls, JavaScrip          | t OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com. |  |  |  |  |  |  |  |  |
| Remote Site Edit  | Save & New Cancel   |  |  |  |  |  |  |  |  |
| Remote Site Name<br>Remote Site URL<br>Disable Protocol Security<br>Description<br>Active | VoiceTranscript  https://saas-data-524-dev-ed.scratch.my.salesforce-scrt.com                                      |  |  |  |  |  |  |  |  |
| Save Save & New Cancel  |   |  |  |  |  |  |  |  |  |
|   |   |  |  |  |  |  |  |  |  |

# Tips for your Genesys Cloud Architect Flow

It is possible to make CX Cloud, Digital and AI for Salesforce Service Cloud stitch Salesforce Contact and Case automatically.

To do so, you need to add the following attributes to the customer participant data to the Genesys Cloud Architect Flow:

- firstName
- lastName
- email
- caseNumber

When the Experience gets created, CX Cloud, Digital and AI for Salesforce Service Cloud will search for a Salesforce Contact with the same email. If not found, it will create a new Contact. If found, it will also try to connect to the given Case Number (if provided).

In Architect, you can use the Set Participant Data step to set the attributes:

| <b>14</b> Set Participant Data |  |  |  |  |  |
|--------------------------------|--|--|--|--|--|
| 1: firstName = State.FirstName |  |  |  |  |  |
| 2: lastName = State.LastName   |  |  |  |  |  |
| 3: email = State.Email         |  |  |  |  |  |

# Multi-Org Setup

Single Salesforce Org with multiple Genesys Cloud Orgs

In cases where a single Salesforce Org needs to be integrated with multiple Genesys Cloud Orgs, it can be accomplished by creating separate Lightning Applications for each respective Org in Genesys Cloud. This can be done regardless of whether Salesforce Cloud Voice is used. This section details the steps / configurations to

integrate a single Salesforce Org with more than one Genesys Cloud Org. This section assumes readers have already completed the setup for a single Genesys Cloud Org, and as such omits details previously covered, yet required to complete the setup. Suffice to say, completing the setup for a single Genesys Cloud org is a prerequisite, specifically the Package Install and Post Install steps covered previously in this document.

Create a new Lightning App for the Respective Genesys Cloud Org

In the Salesforce setup, under the "Apps" section open "App Manager" and click on the New Lighting App button

|   | •                           |                 |      |   |  |            |          |                       |        |                |                      |   |   |     |                   |                 |                         |   |
|---|-----------------------------|-----------------|------|---|--|------------|----------|-----------------------|--------|----------------|----------------------|---|---|-----|-------------------|-----------------|-------------------------|---|
| L | Setup Home Object Manager V |                 |      |   |  |            |          |                       |        |                |                      |   |   |     |                   |                 |                         |   |
| Ľ | App                         | 15              |      |   |  | SETUP      | SULLIZ N | 1788-11847 - 1788-114 |        | 265341317      | NUMAN ////////////// |   | 11 - <i>777 -</i> SAUG H <i>ENNING HING</i> |     | New Lightning App | New Connected A |                         | 1 |
|   |                             | App Manager     |      | _ | Lightning Experience App Manager   |            |          |                       |        |                |                      |   |   |     |                   |                 |                         |   |
| г |                             | AppExchange I   |      |   |  |            |          |                       |        |                |                      |   |   |     |                   |                 |                         |   |
|   |                             |                 |      |   | A 3 14   |            |          |                       |        | $1/2 \sim 1/2$ |                      | - |   |     |                   |                 | - A.                    |   |
|   | >                           | Connected App   | ps   |   |  |            |          |                       |        |                |                      |   |   |     |                   | -               | _                       |   |
|   | >                           | External Client | Apps |   | 24 items - Sorted by App Name - Fitzered by All appmenuitems - TabSet Type |            |          |                       |        |                |                      |   |   |     |                   |                 |                         |   |
|   | >                           | Lightning Bolt  |      |   |  | App Name † | ~        | Developer Name        | $\sim$ | Description    | ~                    |   | Last Modified Date 🗸                        | Ap  | рр Туре           | `               | <ul> <li>Vis</li> </ul> |   |
|   |                             | Makila Appa     |      |   |  |            |          |                       |        |                |                      |   | AIF 18 4 5 4 5 4 5 4 5 1 1 1                | -01 |                   |                 |                         |   |

App Details and Branding For the first step, App Details and Branding, choose an appropriate name considering the fact it may be helpful to easily identity the respective Genesys Cloud Org the Lightning App will represent. After you've chosen a name and filled in the other options, click Next to proceed to the App Options menu.

| New Lightning App  |   |  |  |  |  |  |  |
|--|---|--|--|--|--|--|--|
| Give your Lightning spo a name and description. Upland   | Is & Branding<br>an image and choose the highlight color for its navigation bar.  |  |  |  |  |  |  |
| App Details<br>*App Starse @<br>Extract Center - Hig Second GC Org<br>*Denoiseer Name @<br>Extract_Center_Jay, Second, GC, Org<br>Generation @<br>finter a description | App Brancing  Transf  Primery Color Hex Value  Primery Color Hex Value  Primery Color Hex Value  Primery Primery  Contract Center - My Seco  Contract Center - |  |  |  |  |  |  |
| 0  | - 1 i lier  |  |  |  |  |  |  |

App Options Under the Navigation Style select "Console navigation" (default options my be accepted for the rest) and click Next.

# App Options



# Navigation Style Standard navigation Console navigation Supported Form Factors Desktop and phone Desktop Phone

Setup and Personalization ()

#### Setup Experience

- Setup (full set of Setup options)
- Service Setup

#### App Personalization Settings

Disable end user personalization of nav items in this app

Clear workspace tabs for each new console session

Utility Items On the Utility Items page, add the following:

- 1. Omni-Channel
- 2. Genesys Cloud CX Utility
- 3. CX Cloud, Digital and AI

For each, be sure the Start automatically check box is selected, like so:

| Ø Omni-Channel           | PROPERTIES                | 1 Annove |  |  |
|--------------------------|---------------------------|----------|--|--|
| Genesys Cloud CX Utility | Genesys Cloud CX Utility  |          |  |  |
| CX Cloud, Digital and Al | ✓ Utility Item Properties |          |  |  |
|                          | *Label                    | 0        |  |  |
|                          | Genesys Cloud CX Utility  |          |  |  |
|                          | loon                      | 0        |  |  |
|                          | + falback ×               |          |  |  |
|                          | Panel Width               | 0        |  |  |
|                          | 340                       |          |  |  |
|                          | Panel Height              | 0        |  |  |
|                          | 480                       |          |  |  |
|                          | Start automatically       | 0        |  |  |

After adding CX Cloud, Digital and AI be sure to fill in the required fields. Note, when selecting whether Salesforce Cloud Voice is installed, it should be considered in the context of the Lightning App being created and the Genesys Cloud Org it reflects, meaning it could be answered negatively even if Salesforce Cloud Voice is being used in elsewhere is the Salesforce Org but not in conjunction with "this" App. Additionally, if you haven't already created the OAuth integration in Genesys Cloud to create the Implicit Grant Client ID, this can be done following the steps previously outlined here

With the Utility Items added, click Next to move to the Navigation Items menu.

Navigation Items On the Navigation Items page add Experiences to the list of selected items. Note, if the application also seves voice, the appropriate item should be added. In the screen shot, this is reflected by the Voice Calls item.

| New Lightning App  |                          |             |         |             |   |  |  |  |  |
|--|--------------------------|-------------|---------|-------------|---|--|--|--|--|
| Navigation Items Choose the items to include in the app, and arrange the order in which they appear. Uners can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are drapped from the navigation bar when the app is viewed in a format that the item doesn't augport. |                          |             |         |             |   |  |  |  |  |
|  | Available Items          | (P) Chato + | Selecte | ed Items    |   |  |  |  |  |
|  | Q. Type to filter list   | 0           | _       | Experiences |   |  |  |  |  |
|  | Accounts                 |             | 5       | Voice Calls |   |  |  |  |  |
| 1  | Alert Settings           |             |         |             |   |  |  |  |  |
|  | Al Stes                  |             |         |             |   |  |  |  |  |
|  | Alternative Payment Met  | hods        |         |             |   |  |  |  |  |
|  | Analytics                |             | -       |             |   |  |  |  |  |
|  | App Launcher             | L           | 4       |             | - |  |  |  |  |
|  | R Appointment Categories |             |         |             |   |  |  |  |  |
|  | Appointment invitations  |             |         |             |   |  |  |  |  |
|  | Approval Requests        |             |         |             |   |  |  |  |  |
|  | Asset Action Sources     |             |         |             |   |  |  |  |  |
|  |                          |             |         |             |   |  |  |  |  |
| Back 0   |                          |             |         | o           |   |  |  |  |  |

Click Next to bring up the Navigation Rules menu.

Navigation Rules Accept the default to have Experiences open as workspace tabs and Click Next to move to the Prodfiles menu.

# Navigation Rules

Navigation rules determine whether to open a related record in addition to the primary record.

| E Experiences Voice Calls | Experiences open as     Workspace tabs     Subtabs of |    |
|---------------------------|---|----|
|                           | Account (Account)                                     | \$ |

Profiles The final step to complete before the application is ready is selecting the appropriate Profiles. This will vary by deployment. Once the Profiles have been added, click Save and Finish.

| New Lightning App  |           |                      |  |  |  |  |  |  |  |
|--|-----------|----------------------|--|--|--|--|--|--|--|
| User Profiles<br>Choose the user profiles that can accrete this app. |           |                      |  |  |  |  |  |  |  |
| Azailabie Profiles   |           | Selected Profiles    | Add the profiles appropriate to you deployment, then click Save and Finish |  |  |  |  |  |  |
| Or pype to their list  | 0         | ~                    |  |  |  |  |  |  |  |
| Analytics Cloud Integra  | tion User |                      |  |  |  |  |  |  |  |
| Analytics Cloud Securit  | y User    |                      |  |  |  |  |  |  |  |
| Authenticated Website  |           |                      |  |  |  |  |  |  |  |
| Authenticated Website  |           |                      |  |  |  |  |  |  |  |
| 829 Reordering Portal I  |           | No Profiles selected |  |  |  |  |  |  |  |
| Contract Manager   | 4         |                      |  |  |  |  |  |  |  |
| Custom: Marketing Prof   | Ye .      |                      |  |  |  |  |  |  |  |
| Custom: Sales Prefile  |           |                      |  |  |  |  |  |  |  |
| Custom: Support Profile  |           |                      |  |  |  |  |  |  |  |
| Castomer Community L   | eain User |                      |  |  |  |  |  |  |  |
|  |           |                      |  |  |  |  |  |  |  |
| Beck 00  |           |                      | 6 O Geve & Finish  |  |  |  |  |  |  |

This completes the setup for the new Lightning App. Provided the previous steps for installing the Package and Post Install setup were complete, you will now be able to use the newly created Lightning Application for the Agents affiliated the corresponding Genesys Cloud Org.

#### Summary

This approach works by relying on the combination of the Omni Channel widget and other Utility Items configured within the Lightning Application. When Salesforce Cloud Voice is used, because an agent can only belong to a single contact center in Salesforce, when their assigned contact center represents a CX Cloud integration, when an agent opens the Lightnign Application, they're automatically associated with the corresponding Genesys Cloud Org. In this manor, we can create Lightning Applications for any number of Genesys Cloud Orgs. In the cases where agents do not belong to a contact center, i.e. Salesforce Cloud Voice is not used, we determine the Genesys Cloud Org based on the CX Cloud, Digital and AI Utility Item configuration. Similarly, we can continue to add new Lightning Application as needed when SCV is not used to accommodate integration to additional Genesys Cloud Orgs.