

CX Cloud, Digital and AI for Salesforce Service Cloud

Genesys Innovations

v. 1.7

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CX Cloud, Digital and AI for Salesforce Service Cloud Installation

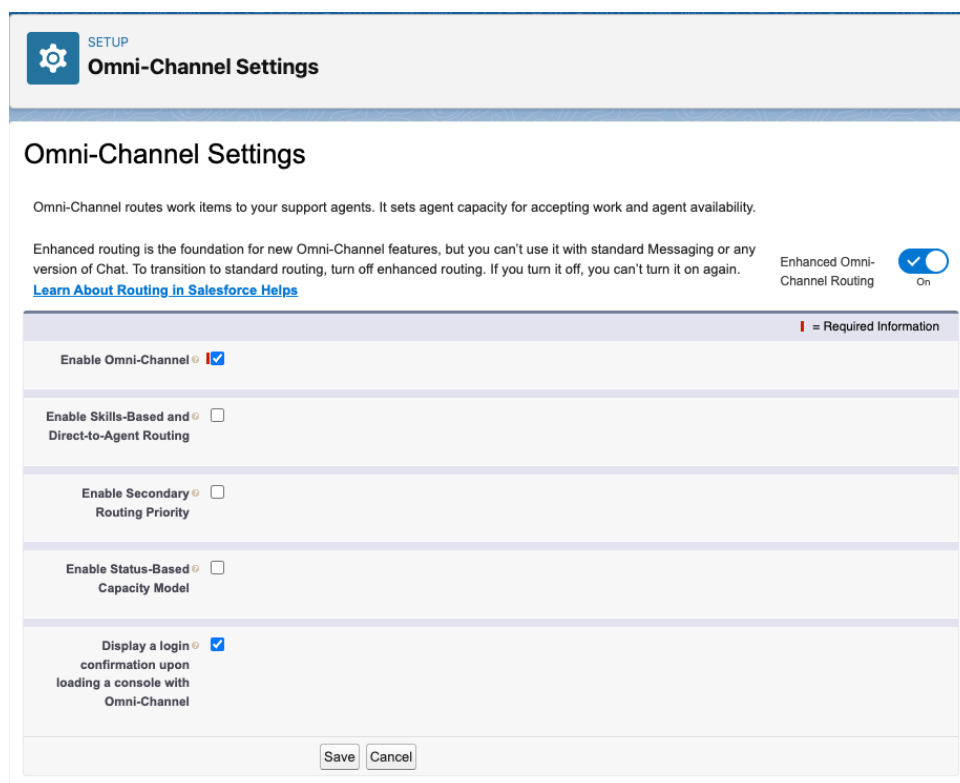
Prerequisites

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

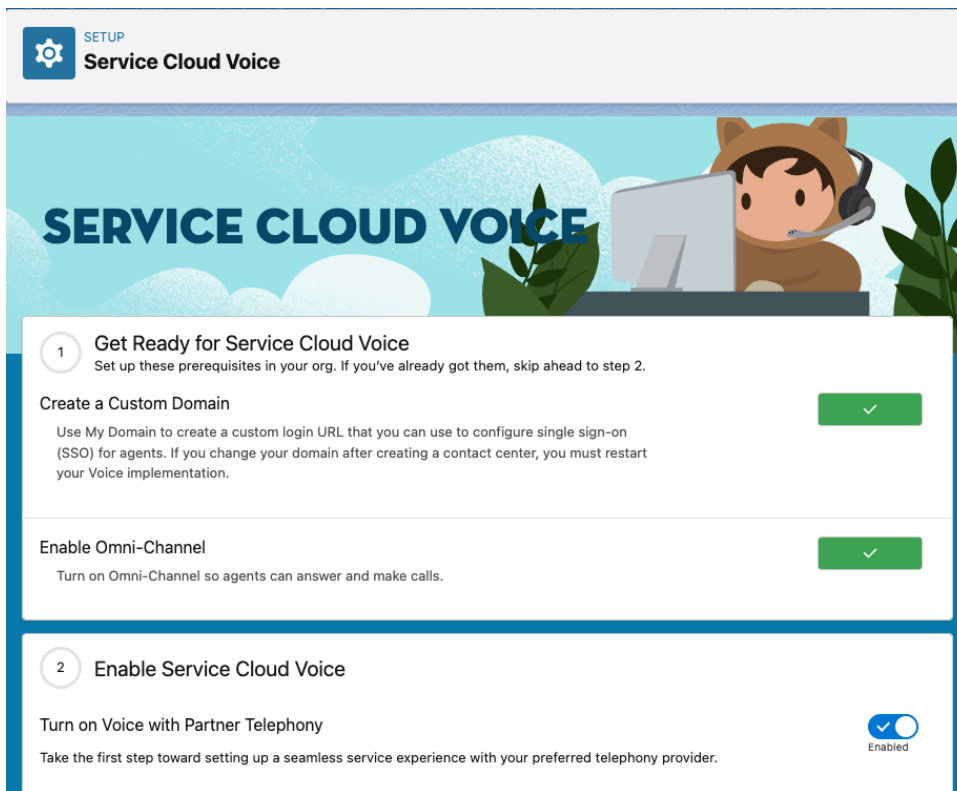
- Omni-Channel
- Service Cloud Voice

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:

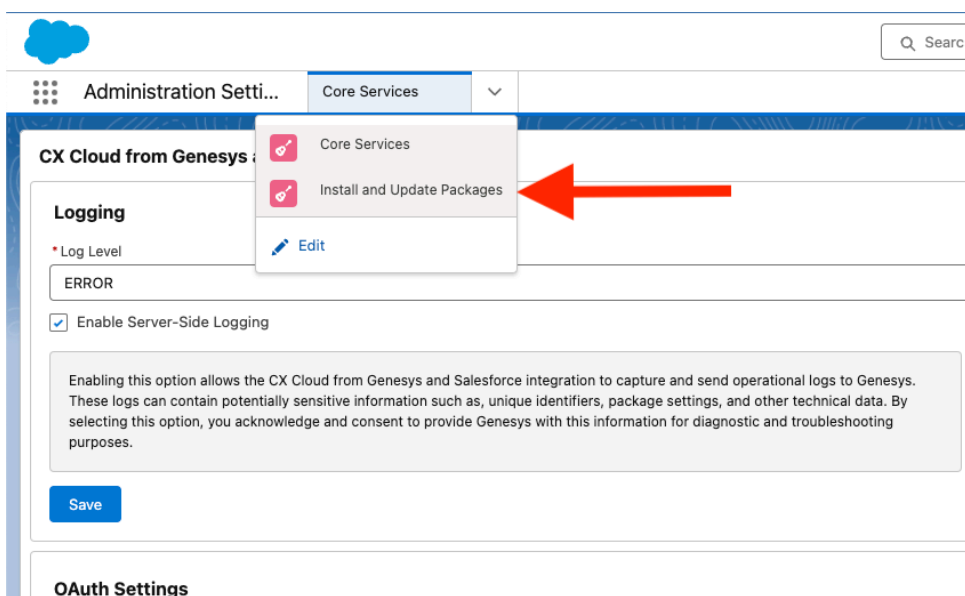


Search for **Partner Telephony Setup**, and make sure that the **Turn on Voice with Partner Telephony** checkbox is checked:

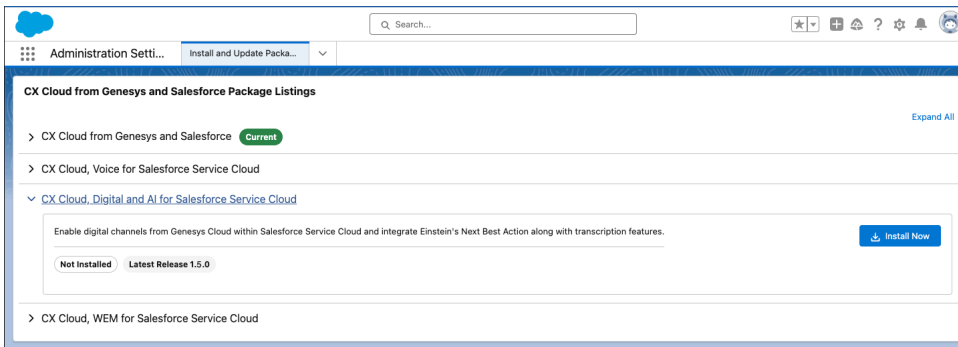


Install the package

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



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

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 Channel for Chats

Create a Service Channel called `Genesys Cloud Messaging` related to `genesysps__Experience__c`. You can set the `minimize widget on accept` and `auto accept` flag to your own preference.

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.

Basic Information

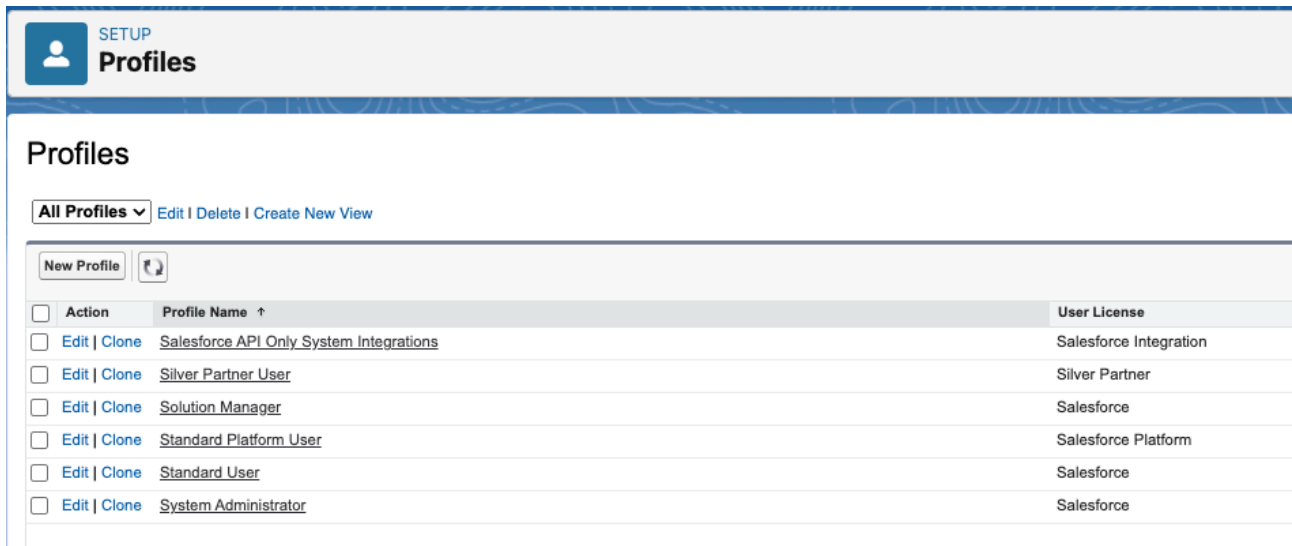
Service Channel Name	<input type="text" value="Genesys Cloud Messagi"/>
Developer Name	<input type="text" value="Genesys_Cloud_Messa"/>
Salesforce Object	<input style="border: 1px solid #ccc;" type="text" value="Experience"/>
Custom Console Footer Component	<input type="text" value=""/>
Minimize the Omni-Channel widget when work is accepted	<input checked="" type="checkbox"/>
Automatically accept work requests	<input type="checkbox"/>

Audio Settings

Override agents' audio settings	<input type="checkbox"/>
--	--------------------------

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).



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:

Field Name	Field Type	Read Access	Edit Access
Account	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Agent Id	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated	Checkbox	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Case	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Completed	Checkbox	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Id	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Detail Analytics	URL	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ended	Date/Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Experience Name	Auto Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Genesys Cloud Interaction Transcript	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Intent	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Interaction Id	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Modified By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last utterance	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Media Type	Picklist	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Experience	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Previous Experience	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Queue Id	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Queue Name	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Related Object	Picklist	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Started	Date/Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Wrapped	Date/Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Wrap-up Code Id	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Wrap-up Code Name	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Wrap-up Code Notes	Text Area	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Wrap-up Code Timeout	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Wrap-up Code Type	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Do the same thing with the **GCX Chat Transcript** :

Field Name	Field Type	Read Access	Edit Access
Body	Long Text Area	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Chat Transcript Name	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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:

Presence Statuses

Let agents indicate when they're online and available to receive work items from a specific service ch

Save Cancel

Basic Information

Status Name

Developer Name

▼ Status Options

Choose whether agents are online or busy when they use this status. Online statuses let agent 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 p

Available Channels		Selected Channels
	Add <input type="button" value="▶"/> <input type="button" value="◀"/> Remove	Chat Genesys Cloud Messaging Phone

Save Cancel

Repeat the process for the Busy status:

Presence Statuses

Let agents indicate when they're online and available to receive work items from a s

Basic Information

Status Name

Developer Name

▼ Status Options

Choose whether agents are online or busy when they use this status. Online s
indicate that they're unavailable to receive work items.

Online

Busy

And finally the `Available` status:

Presence Statuses

Let agents indicate when they're online and available to receive work items from a specific se

Basic Information

Status Name

Developer Name

▼ Status Options

Choose whether agents are online or busy when they use this status. Online statuses l
indicate that they're unavailable to receive work items.

Online

Busy

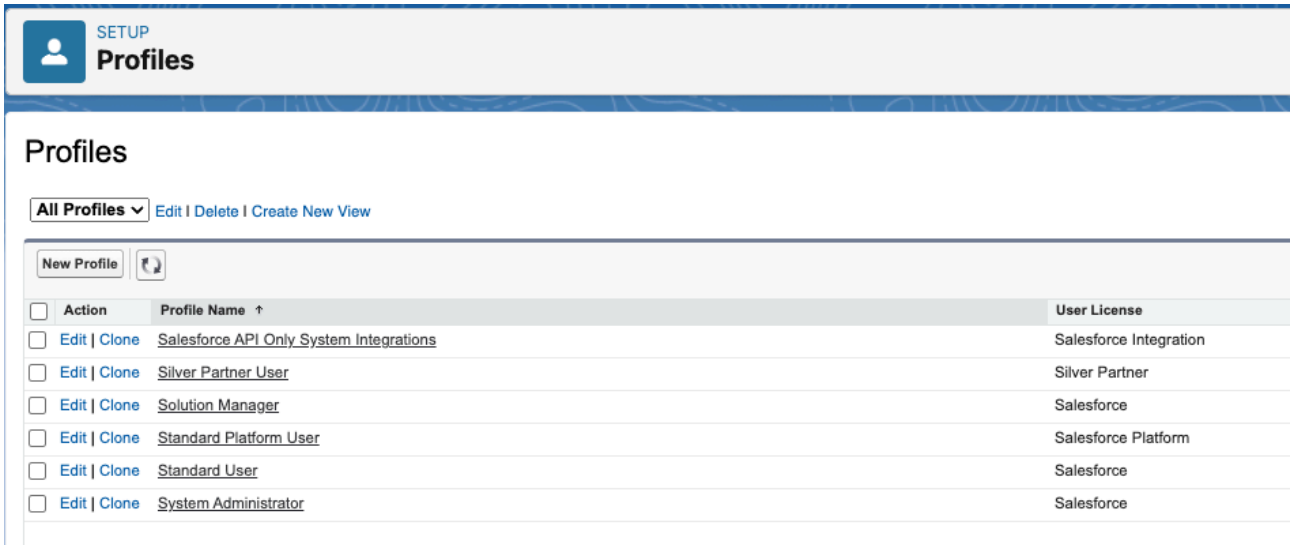
▼ Service Channels

Select one or more service channels to assign to this presence status. Agents logged in

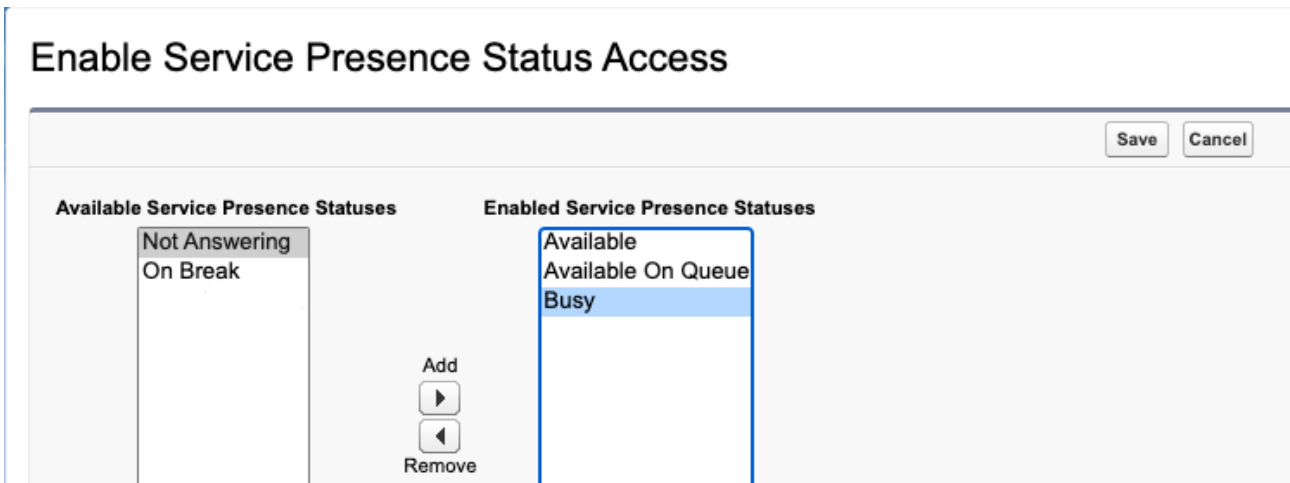
Available Channels		Selected Channels
<div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div>	<input type="button" value="Add"/> <input type="button" value="Remove"/>	<div style="border: 1px solid #ccc; padding: 5px;"><p>Chat</p><p>Genesys Cloud Messaging</p><p>Phone</p></div>

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).



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. 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:

Presence Configurations

Define how much work agents can accept and which Omni-Channel features they

With Presence Configurations, you can specify your agents' overall capacity for work agents can interact with work that's assigned to them, such as whether or not agents

Basic Information


Presence Configuration Name

Developer Name


Capacity

Automatically accept work requests

Allow agents to decline work requests

Update Status on Decline 

Allow agents to choose a decline reason

Update Status on Push Timeout 

Audio Settings

Play a notification sound for work requests

Notification Sound

Default

Custom sound

Sound Length (Seconds)

Maximum: 30

Play a notification sound if Omni Channel loses connection

After Conversation Work Time

Give agents wrap-up time after conversations

Note: If you want to have your agents answering chat conversations automatically, you should configure the Presence Configuration in Salesforce and not set the queue to auto-answer in Genesys Cloud.

Create a Routing Configuration

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

Create a Routing Configuration called Experiences with a priority of 1 and External Routing model.

Routing Configurations

The routing priority determines the order in which work items are pushed to agents. Higher priority work items are pushed first.

The routing model determines how to distribute work items to your agents. It acts as a tiebreaker if two work items have the same priority. It also acts as a tiebreaker between work item capacity and open work items.

Basic Information

Routing Configuration Name

Developer Name

Overflow Assignee ⚠ If you don't give the overflow assignee, the overflow work items will be rejected.

Routing Settings

The routing priority determines the order in which work items across your Omni-Channel queues get processed. Higher priority work items are processed first.

The routing model determines how to evenly distribute work items to your agents. It acts as a tiebreaker if two work items have the same priority.

Routing Priority

Routing Model

Push Time-Out (seconds)

Work Item Size

Specify the size of the work items in the queues associated with this configuration. You can size items in units or as a percentage of capacity.

Units of Capacity

Percentage of Capacity

Create the flows

Create a Backup Queue 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 when sending notifications (for example

Label

Queue Name i

Queue Email

Send Email to Members

Configuration with Omni-Channel Routing

If your organization uses Omni-Channel, you can link queues to a routing configuration. This will pu

Routing Configuration 🔍

Supported Objects

Select the objects you want to assign to this queue. Individual records for those objects can then be

Available Objects		Selected Objects
Agent Work		Experience
Alternative Payment Method		
Appointment Bundle Config		
Appointment Bundle Policy		
Attribute Definition		
Attribute Picklist		
Authorization Form		
Authorization Form Consent		
Authorization Form Data Use		
Business Brand		
Case		
Change Request		
GCX Chat Transcript		
Communication Subscription		

Add

Remove

Queue Members

To add members to this queue, select a type of member, then choose the group, role, or user from those objects.

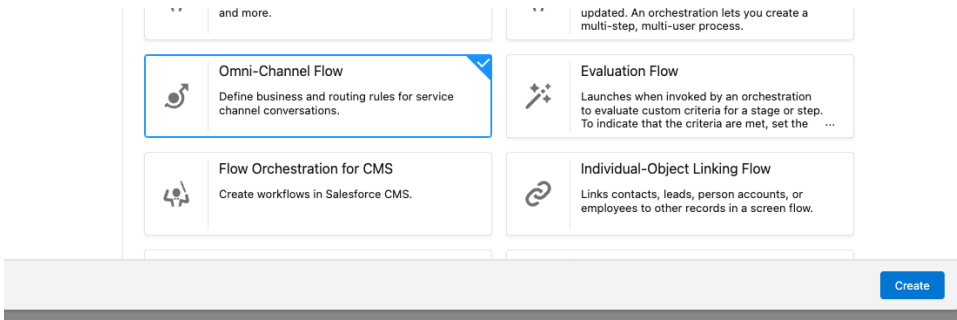
Search: for:

Available Members	Selected Members
User: Integration User	User User
User: Security User	

Add

Create the Flow to pop an 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** :



Add a new Resource of type Variable called input_record of type genesysps__Experience__c :

The 'New Resource' dialog box is shown with the following configuration:

- Resource Type: Variable
- API Name: input_record
- Description: (empty)
- Data Type: Record
- Allow multiple values (collection):
- Object: Experience
- Availability Outside the Flow:
 - Available for input:
 - Available for output:

 Buttons for 'Cancel' and 'Done' are at the bottom right.

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


Add a new Resource of type Variable called recordId if type Text :

The 'New Resource' dialog box is shown with the following configuration:

- Resource Type: Variable
- API Name: recordId
- Description: (empty)
- Data Type: Text
- Allow multiple values (collection):
- Default Value: Enter value or search resources... (with search icon)
- Availability Outside the Flow:
 - Available for input:
 - Available for output:

 Buttons for 'Cancel' and 'Done' are at the bottom right.

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

Route to Agent (Route_to_Agent) 

Set Input Values

*** How Many Work Records to Route?** 

- Single
 Multiple

*** Record ID Variable***** Service Channel***** Route To****Agent**

- Select Agent
 Use Variable

*** Agent ID**

- Required Agent 

Backup Queue

- Select Queue
 Use Variable

*** Queue ID**

The flow should look like this:



Save it as **Pop Experience to Agent** and activate the flow.

Create the Flow to route the 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 **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 when they're created, updated, 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
 Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

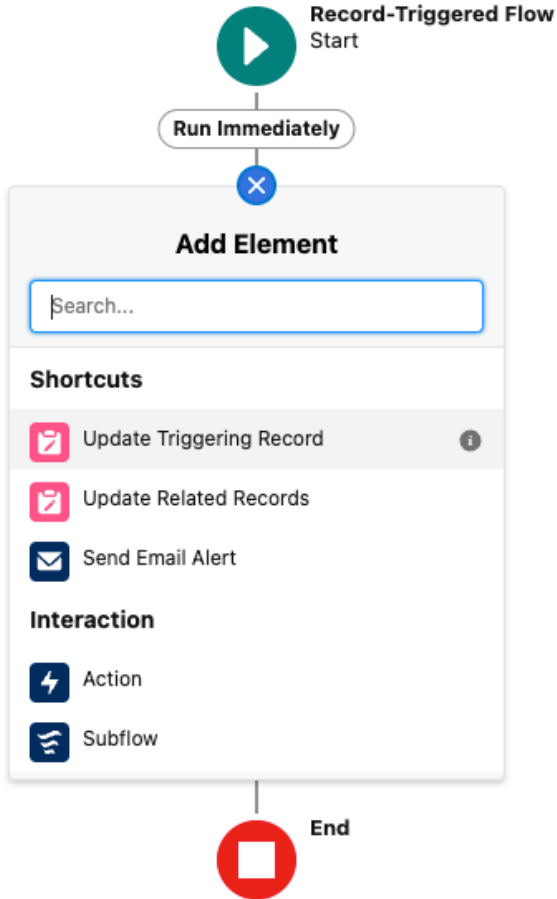
If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Field	Operator	Value
genesysps__Interaction_Id__c	Is Null	False

Add a **Subflow** step after the **Start** step:



And configure the subflow as follows:

The screenshot shows the "New Subflow" configuration interface. At the top, it says "New Subflow". Below that is a "Referenced Flow" field containing "Pop Experience to Agent". A paragraph of text explains: "Use values from the parent flow to set the inputs for the 'Pop Experience to Agent' flow. By default, the parent flow stores all outputs. You can either reference outputs via the API name of the Subflow element or manually assign variables in the parent flow to store individual outputs from the 'Pop Experience to Agent' flow." Below this are two input fields: "Label" with the value "Pop Experience" and "API Name" with the value "Pop_Experience". There is a "Description" text area below these. Another "Referenced Flow" section shows a selection of "Pop Experience to Agent" with an "Open Referenced Flow" link. The "Set Input Values" section contains two rows: "input_record" with the value "{!\$Record}" and an "Include" toggle that is turned on; and "recordId" with the value "{!\$Record.Id}" and an "Include" toggle that is also turned on. At the bottom right, there are "Cancel" and "Done" buttons.

Save it as `Route Experience to Agent` 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.

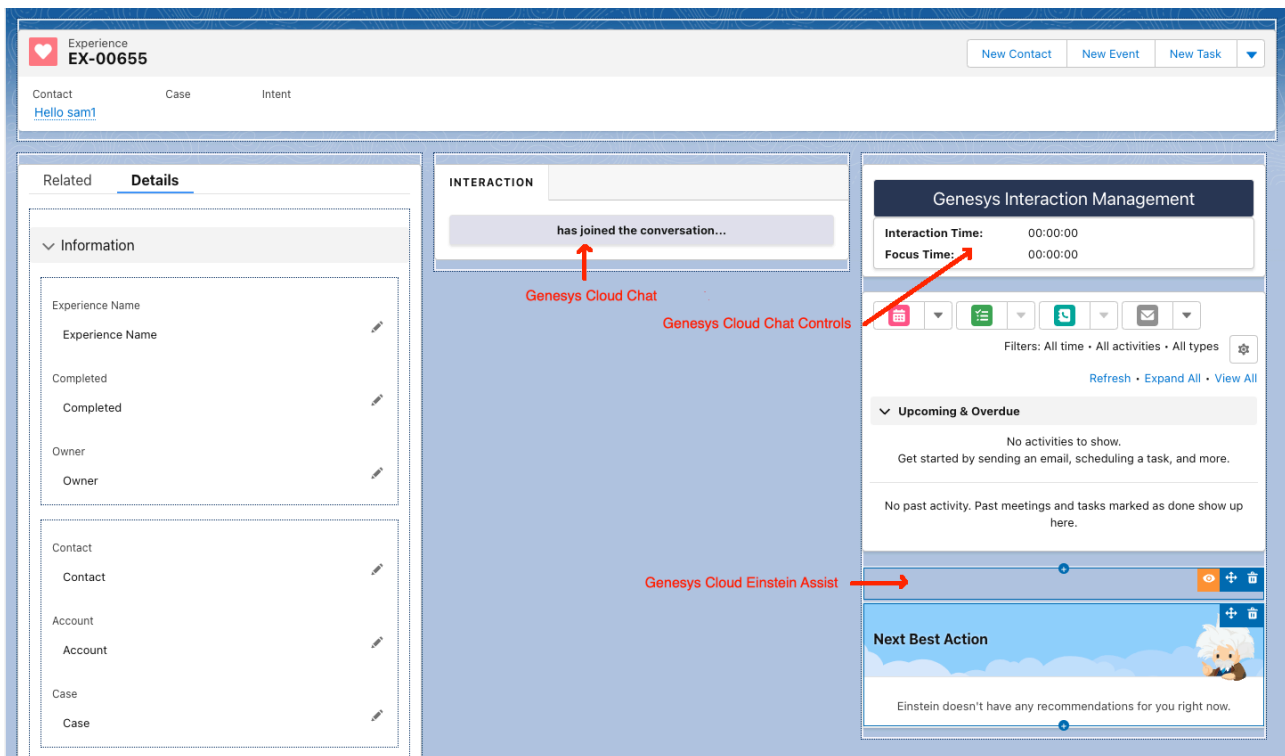
For an optimal experience, we recommend the following components:

- **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).

2 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.

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



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 / Salesforce

Integrations

Actions

Single Sign-on

OAuth

Authorized Applications

Client Details

App Name

Salesforce

Description

Token Duration (seconds): the number of seconds, between 5mins and 48hrs, until tokens created with this client expire.

86400

Grant Types

Client Credentials

Code Authorization

Token Implicit Grant (Browser)

SAML2 Bearer

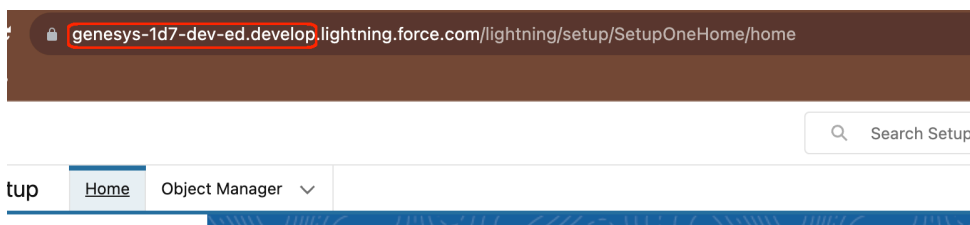
Authorized redirect URIs (one per line)

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 ,
 - routing:readonly ,
 - upload .
 - users:readonly
- 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:



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 `App Manager` and choose one of the Lightning apps (you can also create your own), here we will use the `Service Console` app. Click on the `Edit` button:

Lightning Experience App Manager

14 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer ...	Description	Last Modified ...	App...	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	✓
3	Bolt Solutions	LightningBolt	Discover and manage busines...	8/22/2023, 9:16 PM	Lightning	✓
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	✓
6	Digital Experiences	SalesforceCMS	Manage content and media fo...	8/22/2023, 9:16 PM	Lightning	✓
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	✓
13	Service Console	LightningService	(Lightning Experience) Lets s...	8/22/2023, 10:37 P...	Lightning	✓
14	Site.com	Sites	Build pixel-perfect, data-rich ...	8/22/2023, 9:16 PM	Classic	

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

App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items**
- Navigation Rules
- User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

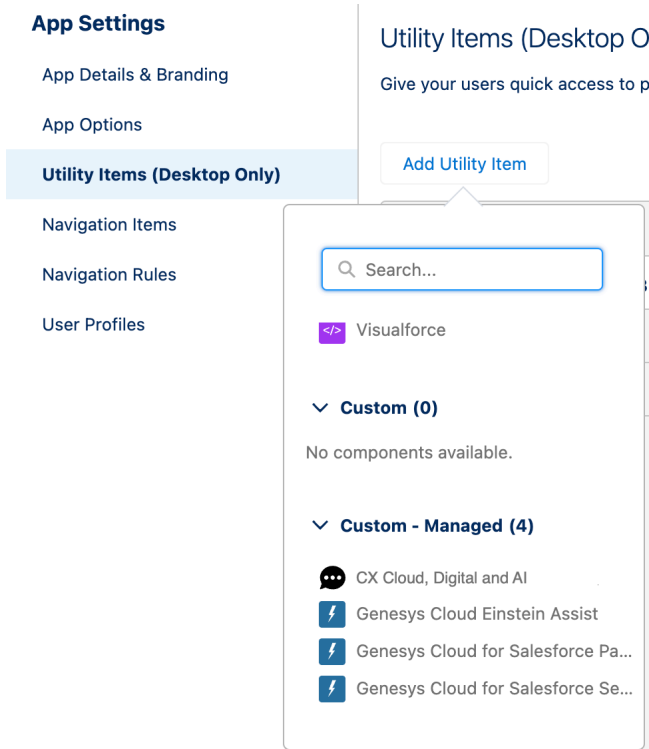
Search: exper

- Experiences

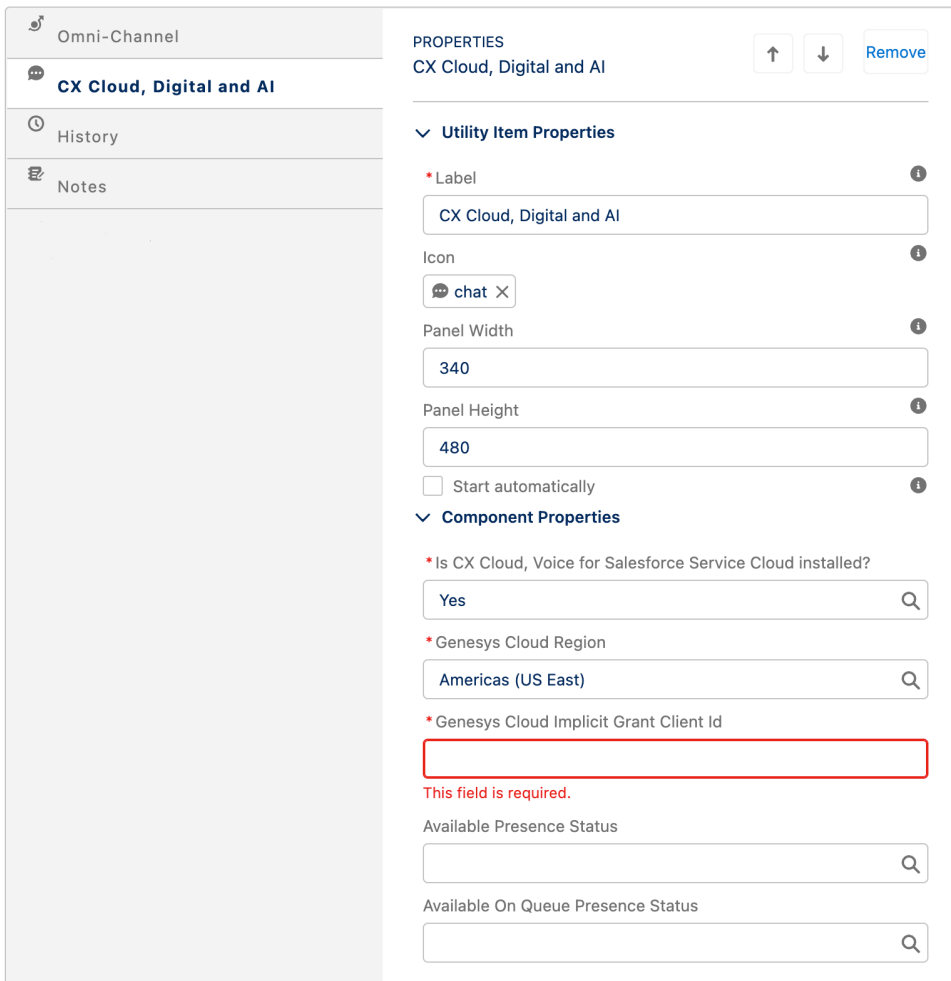
Selected Items

- Digital Experiences Home
- CMS Channels
- CMS Workspaces
- All Sites

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:



You can also change the label and icon to your liking.

Notes:

- Do not forget to check the **Start Automatically** box.
- If you have installed CX Cloud, Voice for Salesforce Cloud Voice, select Yes. You can choose any status in the latter fields, they will not be used by CX Cloud, Digital and AI for Salesforce Cloud Voice.

If you didn't add **Genesys 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

- App Details & Branding
- App Options
- Utility Items (Desktop Only)**
- Navigation Items
- Navigation Rules
- User Profiles

Utility Items (Desktop Only)
Give your users quick access to p

[Add Utility Item](#)

Search...

- Visualforce
- Custom (0)**
No components available.
- Custom - Managed (4)**
 - CX Cloud, Digital and AI
 - Genesys Cloud Einstein Assist
 - Genesys Cloud for Salesforce Pa...
 - Genesys Cloud for Salesforce Se...

The screenshot shows the configuration page for 'Genesys Cloud Einstein Assist' within the Salesforce Omni-Channel interface. The left-hand navigation pane includes 'Omni-Channel', 'Genesys Cloud Einstein Assist', 'History', and 'Notes'. The main configuration area is titled 'PROPERTIES' and contains the following fields:

- Utility Item Properties:**
 - * Label:** Text input field containing 'Genesys Cloud Einstein Assist'.
 - Icon:** Selection button showing a lightning bolt icon and the text 'fallback X'.
 - Panel Width:** Text input field containing '340'.
 - Panel Height:** Text input field containing '480'.
 - Start automatically:** Checked checkbox.
- Component Properties:**
 - Trained ModelId:** Text input field containing 'BHHD3BZZMBLX6IG7RTDASUBOKA'.
 - Email ID:** Text input field containing 'test-jdaxpp5qoxy0@example.com'.
 - * Private Key:** Text input field containing '-----BEGIN RSA PRIVATE KEY----- MIEvQIBADANBgkqhkiG9w0BA'.
 - * Contact Center Name:** Text input field containing 'GenesysVoice'.

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.

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](#).

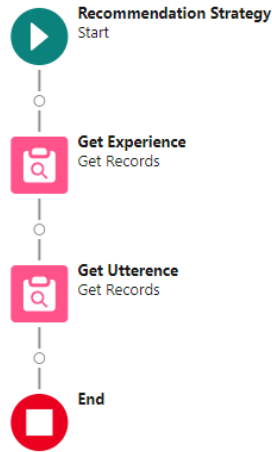
Create a Recommendation Strategy for Einstein's Next Best Action

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

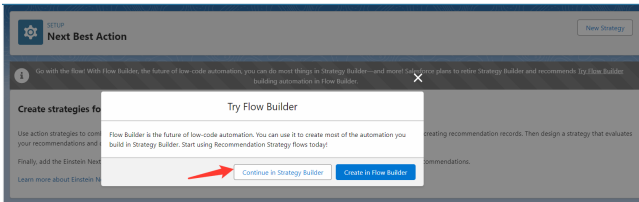
- Go to Setup and use the Quick Find box to search for "Flows". Select 'Flows' and then click 'New Flow'.
- In the 'Templates' tab, choose 'Recommendation Strategy' as the flow type and click 'Create'.
- To load the desired records for your recommendation, add a 'Get Records' element to the flow. Set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

- 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.

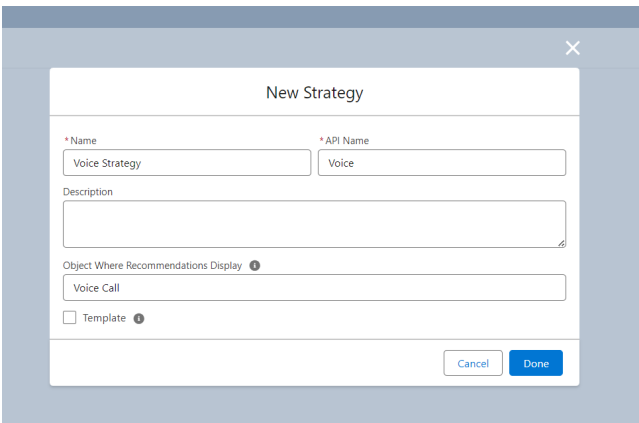


- Finally, activate your flow.

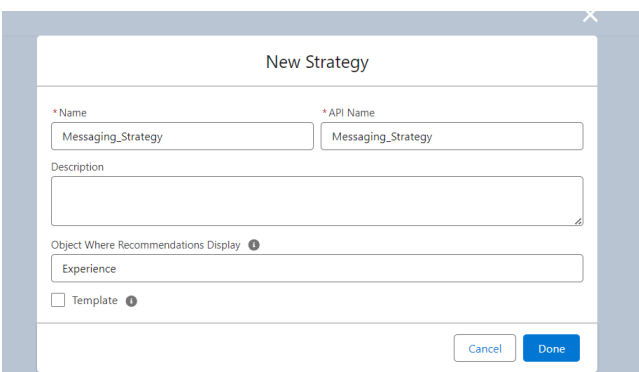
Select **Continue in Strategy Builder**



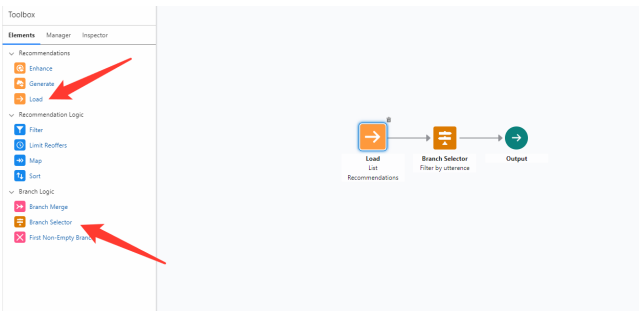
For VoiceCall: Select the **VoiceCall** Object.



For Messaging: Select the **Experience** Object.



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"

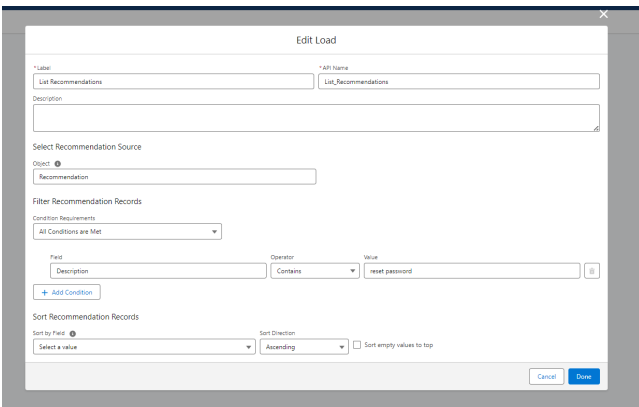
Field:

Purpose: Select the specific field from the recommendation records that will be evaluated. Input Type: Drop-down 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.



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.

Edit Branch Selector

Add conditions to branches. When the condition is true, the recommendations in the branch move forward.

*Label: *API Name:

Description:

Settings

Evaluate each branch in order, starting at the top of the canvas and moving down. Branches that meet the conditions are allowed.

Only allow recommendations from the first branch that meets the conditions:

Branch 1: List Recommendations

Recommendations from branch 1 are allowed when this condition is true.

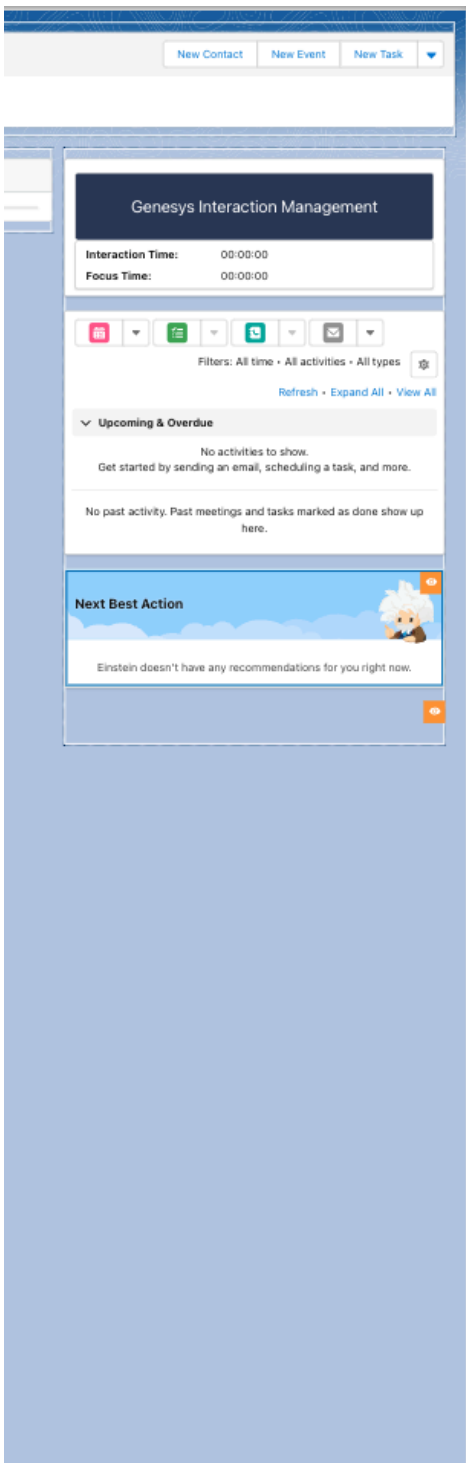
Standard | Advanced

When to Execute Filter:

Resource: Operator: Value:

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:



Page > Einstein Next Best Action

Show users the best action or offer after creating recommendations and action strategies. [Learn more.](#)

Title ⓘ

Next Best Action

Hide Einstein Header

* Strategy Source ⓘ

Strategy Builder X

* Action Strategy ⓘ

Message strategy X

Maximum Recommendations Displayed

1 X

Hide Empty Component ⓘ

Launch Recommendation Action In

Dialog Window X

Show Title

Show Image

Show Description

Show Reject Option

Launch Flow on Rejection

Set Component Visibility

Filters

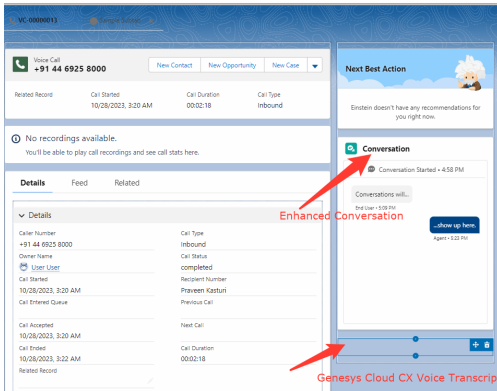
1 Record > Completed Equal false X

+ Add Filter

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:

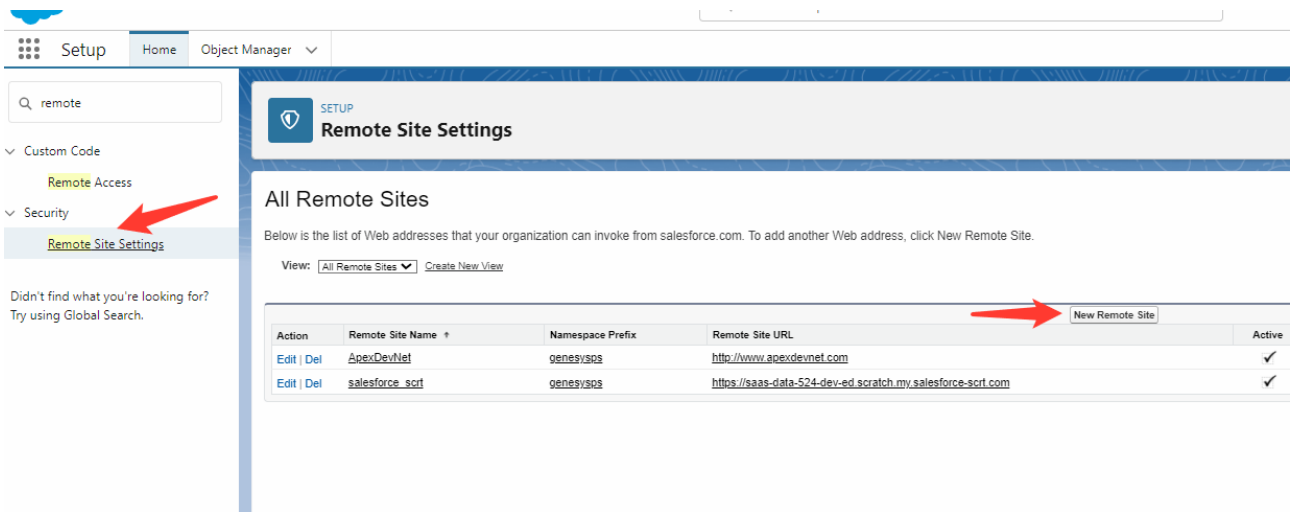
- Go to Setup in Salesforce.
- In the Quick Find box, enter "Lightning App Builder."
- Click "Lightning App Builder" under User Interface.
- In the Lightning App Builder, select the VoiceCall record page
- In the App Builder, add the following components:
 - Enhanced Conversation (Standard Salesforce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



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



To modify your Salesforce domain URL and replace “lightning.force.com” with “.my.salesforce-scr1.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-scr1.com”. Using the extracted domain prefix, your new URL will look like this: https://saas-data-524-dev-ed.scratch.my.salesforce-scr1.com.

Save the setting.

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:

