CX Cloud, Digital and AI for Salesforce Service Cloud

Genesys Innovations

v. 1.7

Contents

CX Cloud, Digital and AI for Salesforce Service Cloud Installation

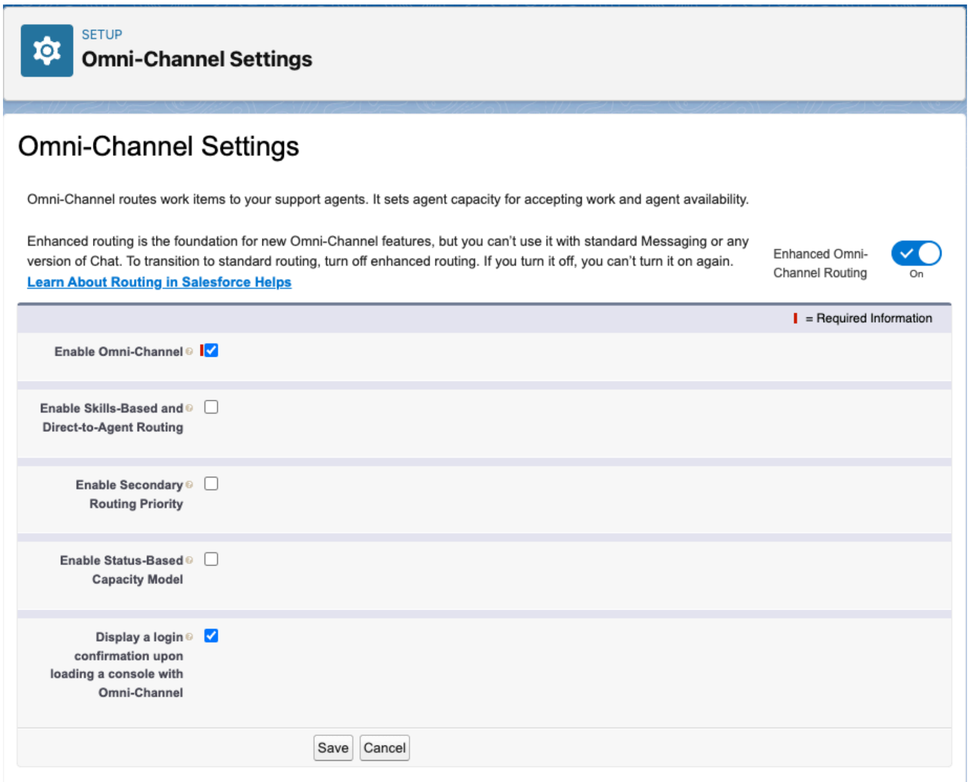
Prerequisites

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

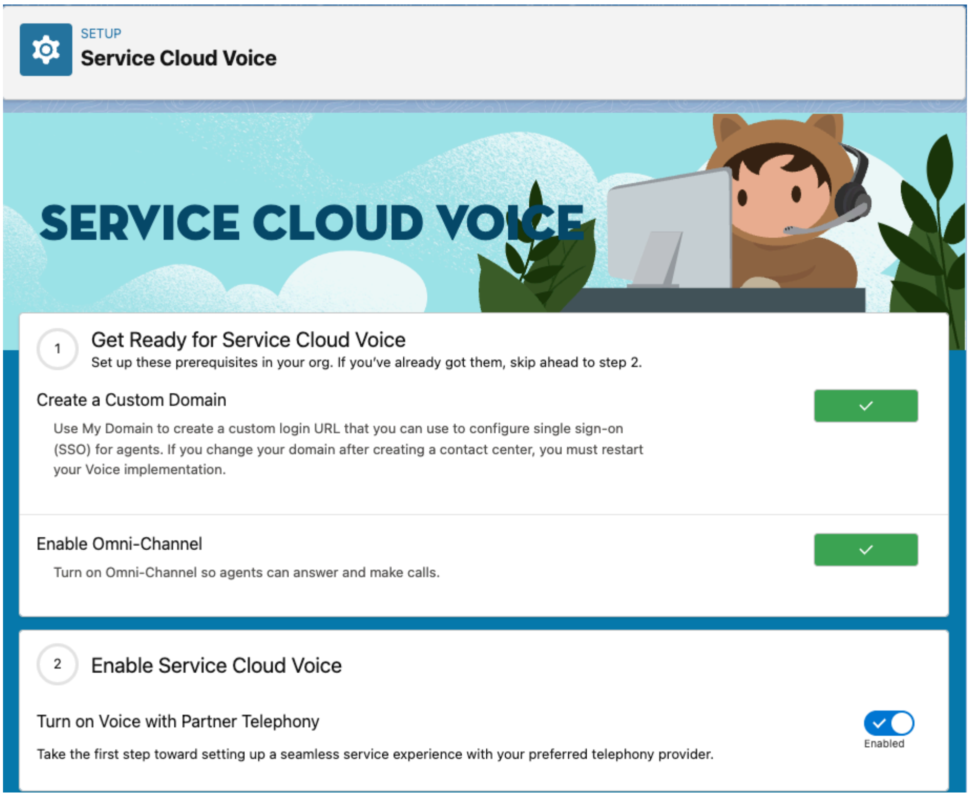
- Omni-Channel
- Service Cloud Voice

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:

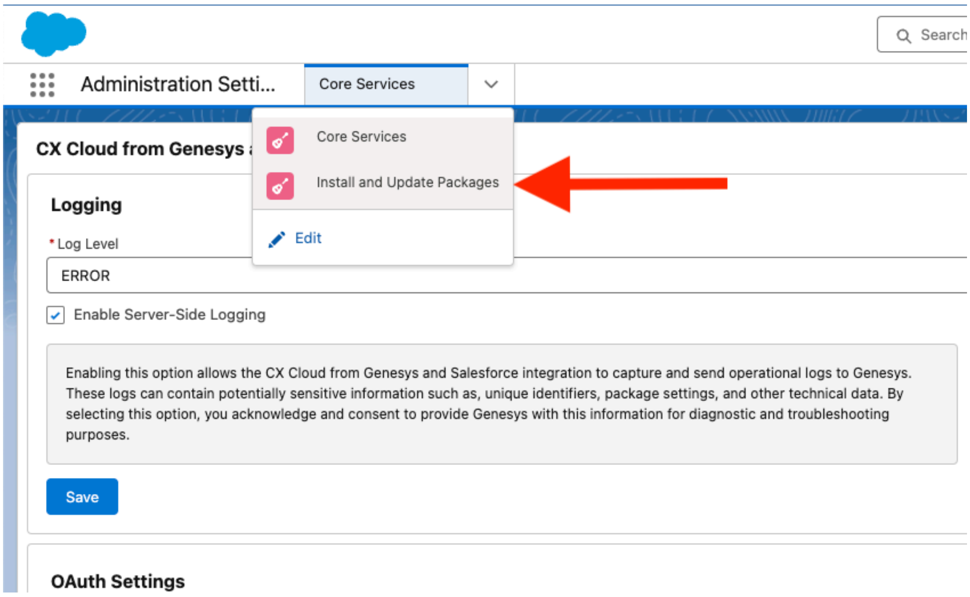


Search for `Partner Telephony Setup`, and make sure that the `Turn on Voice with Partner Telephony` checkbox is checked:

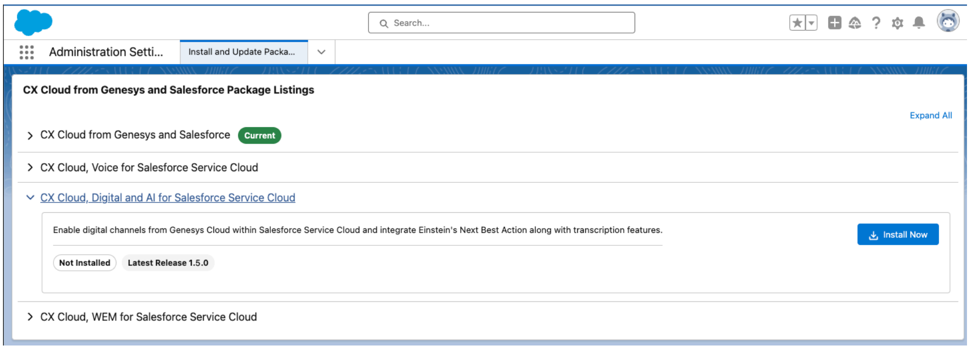


Install the package

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:



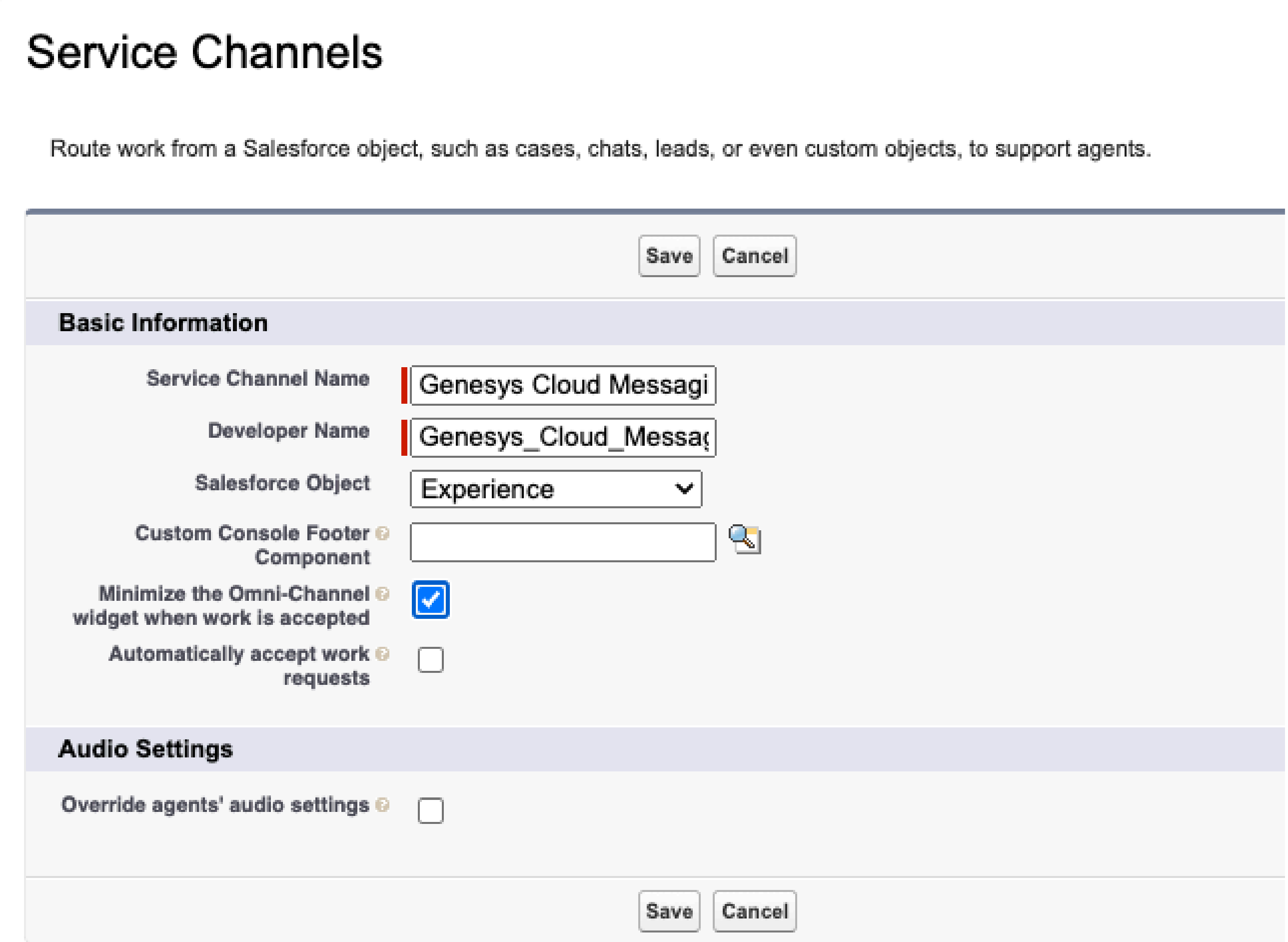
Post Install steps

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:



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).

SETUP
Profiles

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

Action	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:

Edit | Back to Profile

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

Do the same thing with the `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	✓	✓

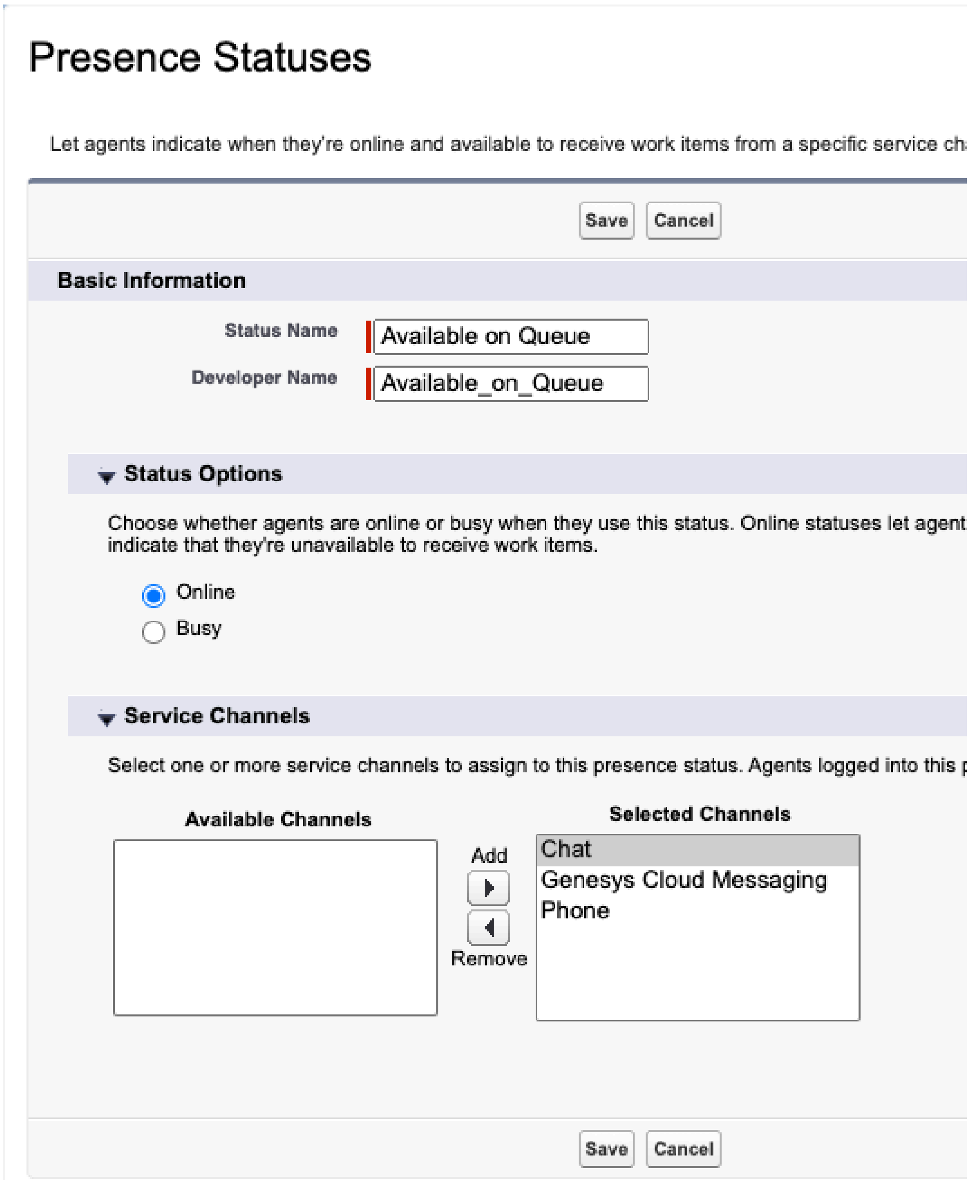
Create the Service Presence Statuses

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.

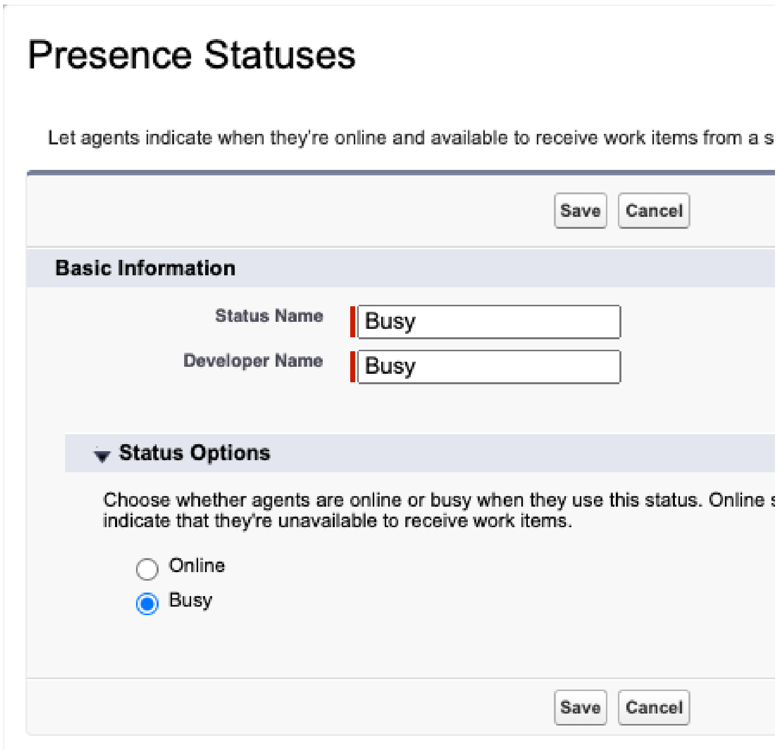
Create, at least, the following Service Presence Statuses connected to the `Genesys Cloud Messaging` Service Channel you created in the previous step:

- `Available`
- `Available on Queue`
- `Busy`

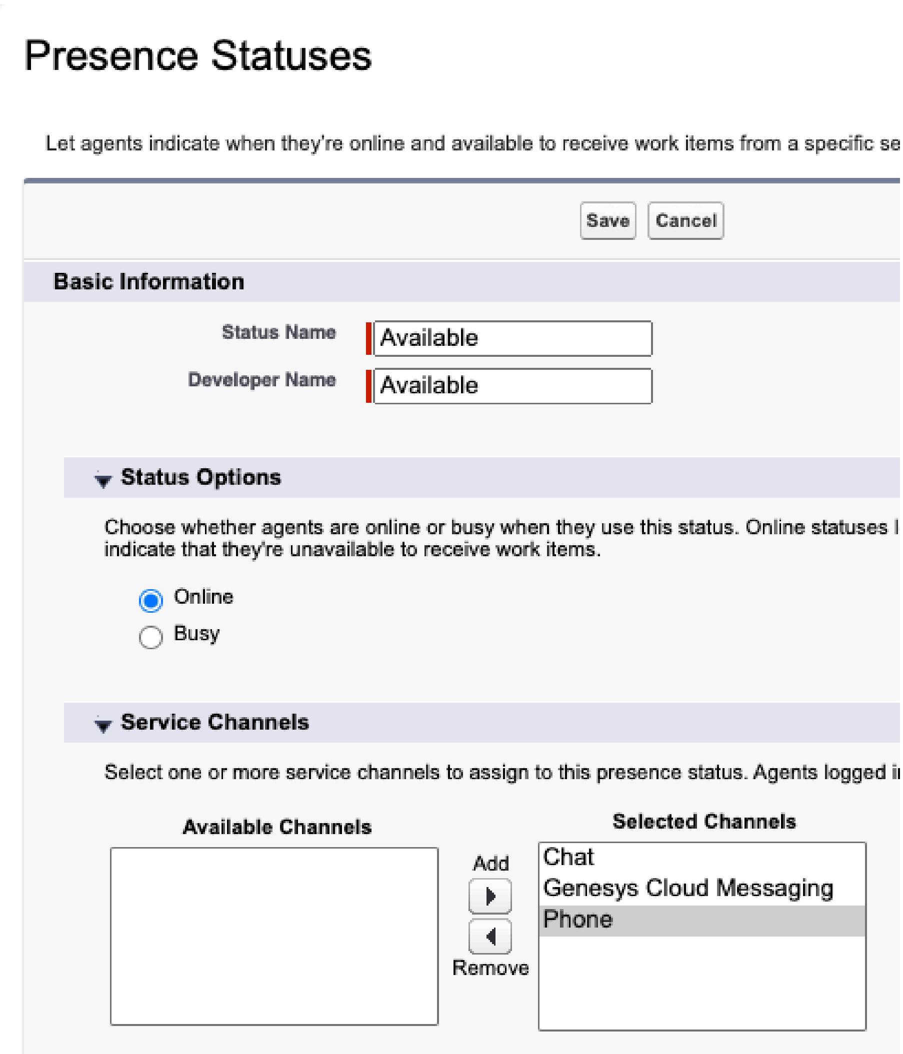
On the Setup screen, search for `Presence Statuses` , click on `New` , and fill in the form:



Repeat the process for the `Busy` status:

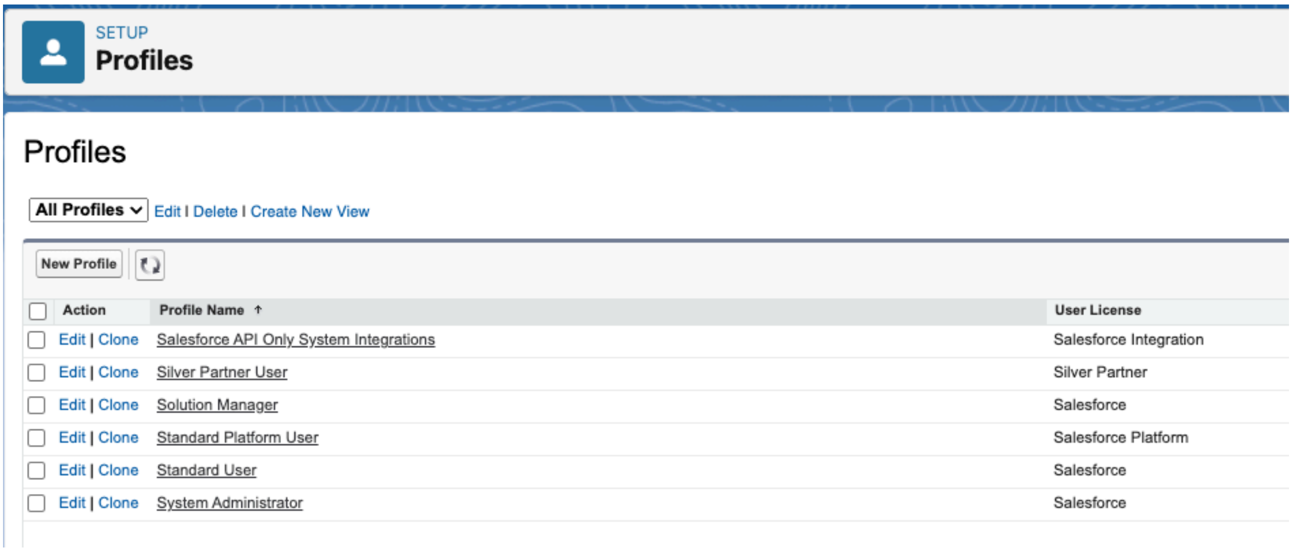


And finally the `Available` status:

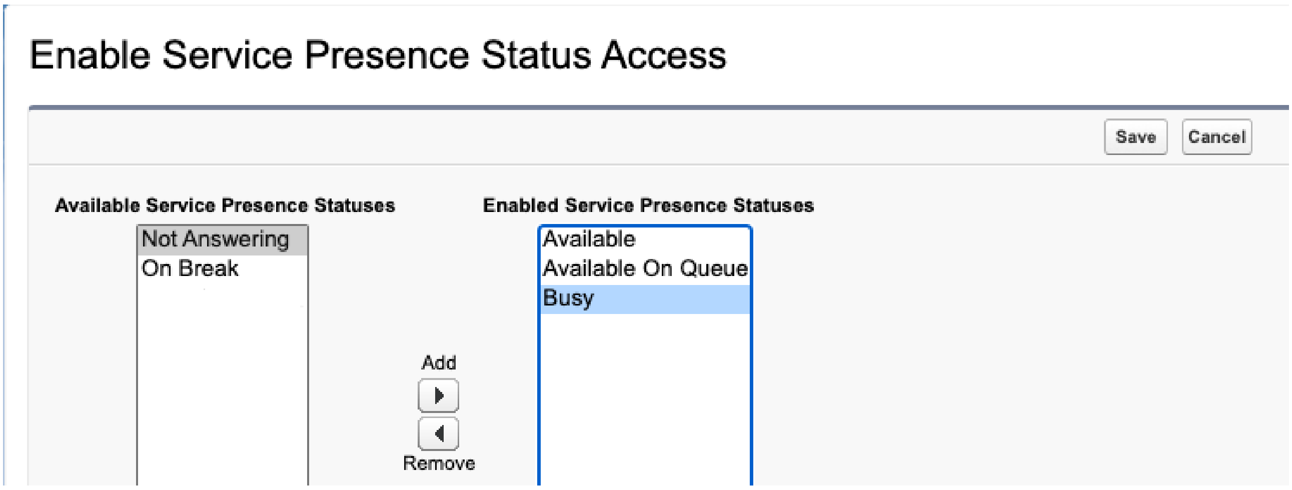


Assign the Presence Statuses to User Profiles

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).



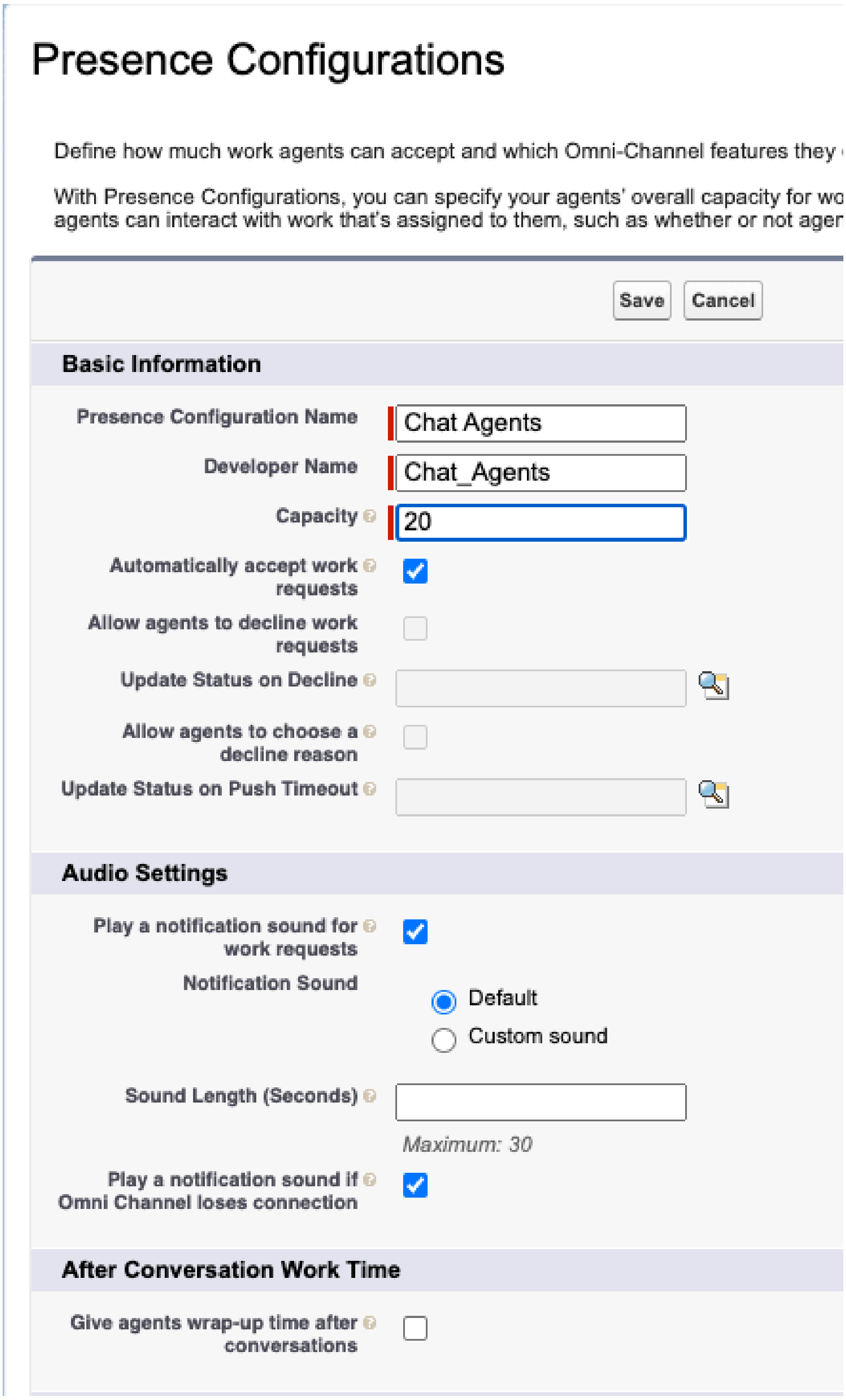
Click on the `Enabled Service Presence Status Access[0]` link, and then on the `Edit` button, and add all the statuses you created in the previous step:



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:

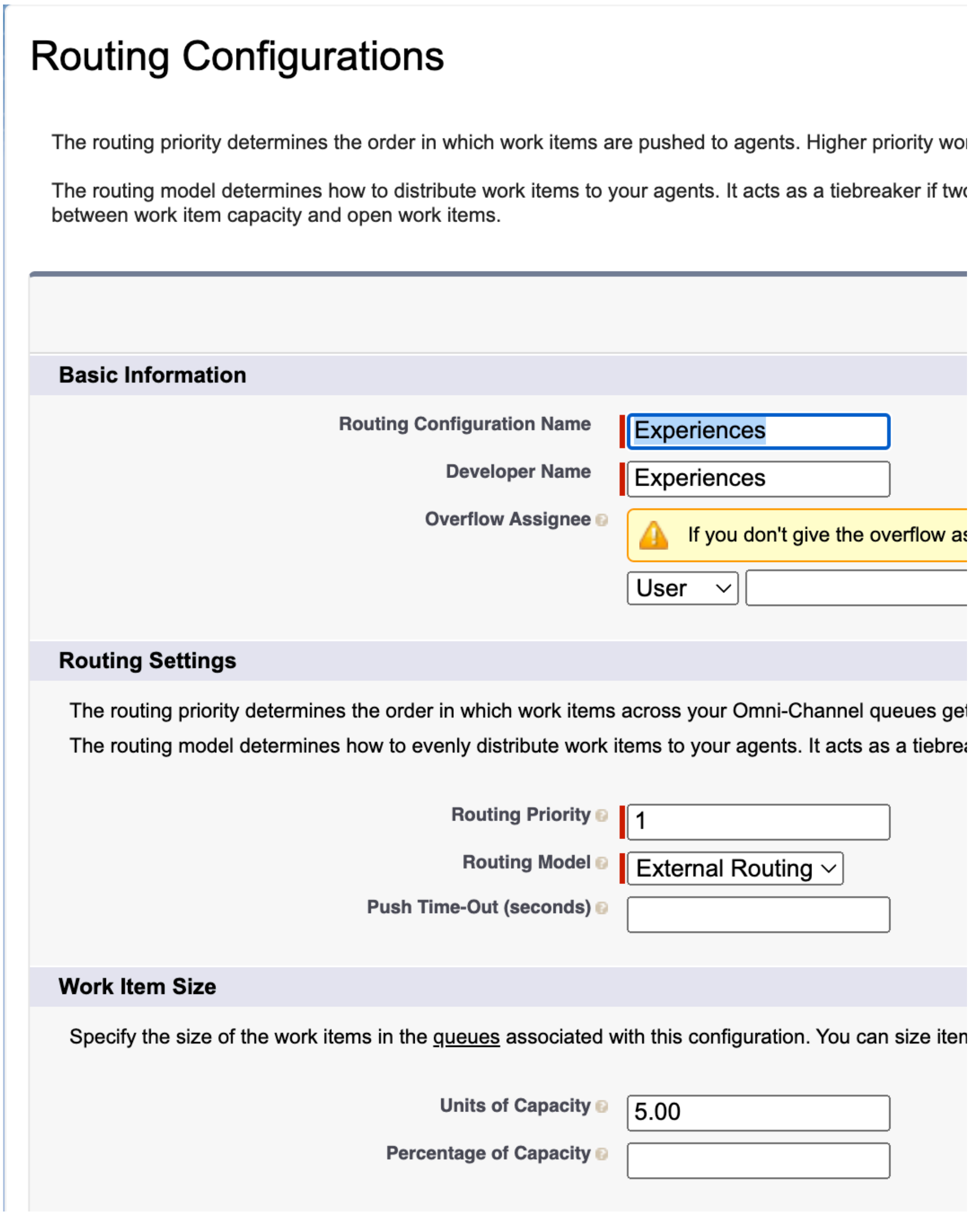


Note: If you want to have your agents answering chat conversations automatically, you should configure the `Presence Configuration` in Salesforce and not set the queue to auto-answer in Genesys Cloud.

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.

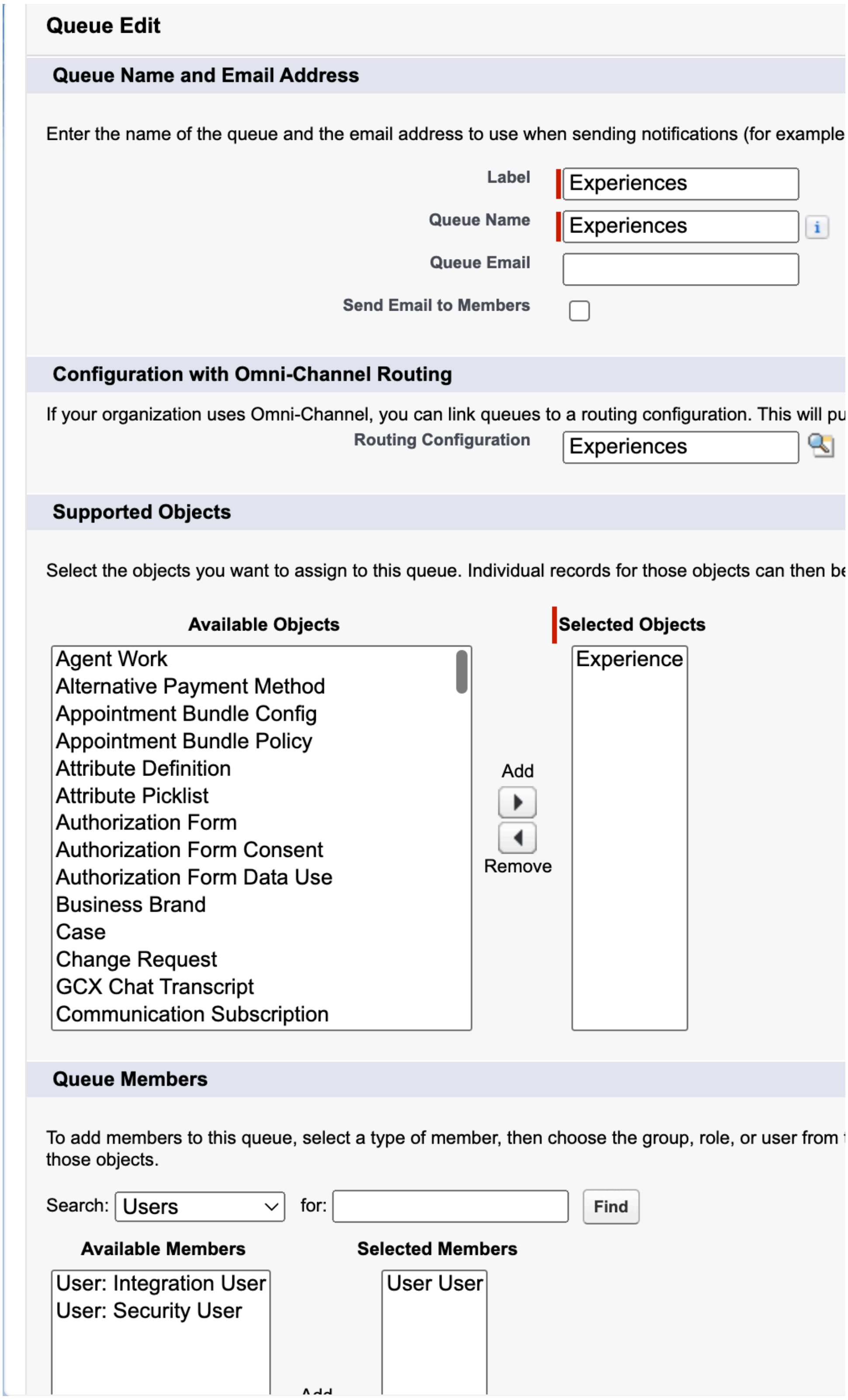


Create the flows

Create a Backup Queue for the flows

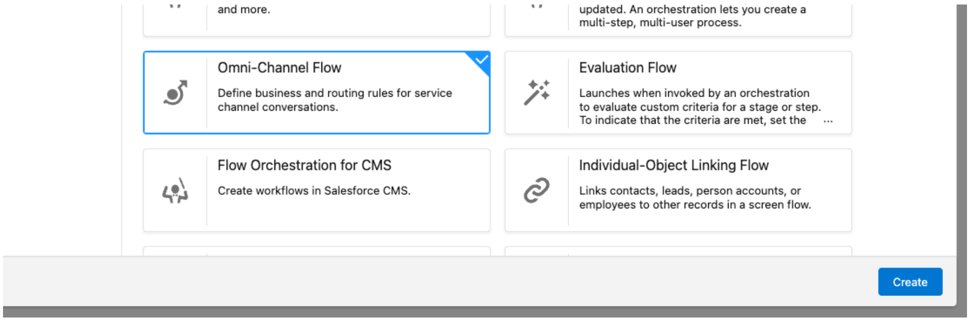
On the setup screen, search for `Queues` , and click on the `New` button.

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.

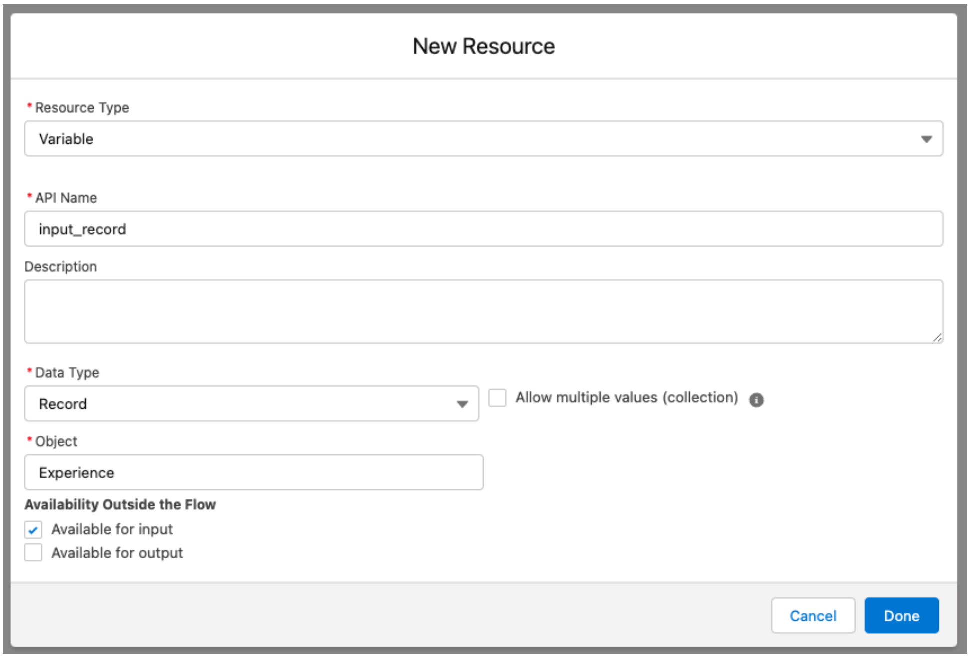


Create the Flow to pop an Experience to an agent

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

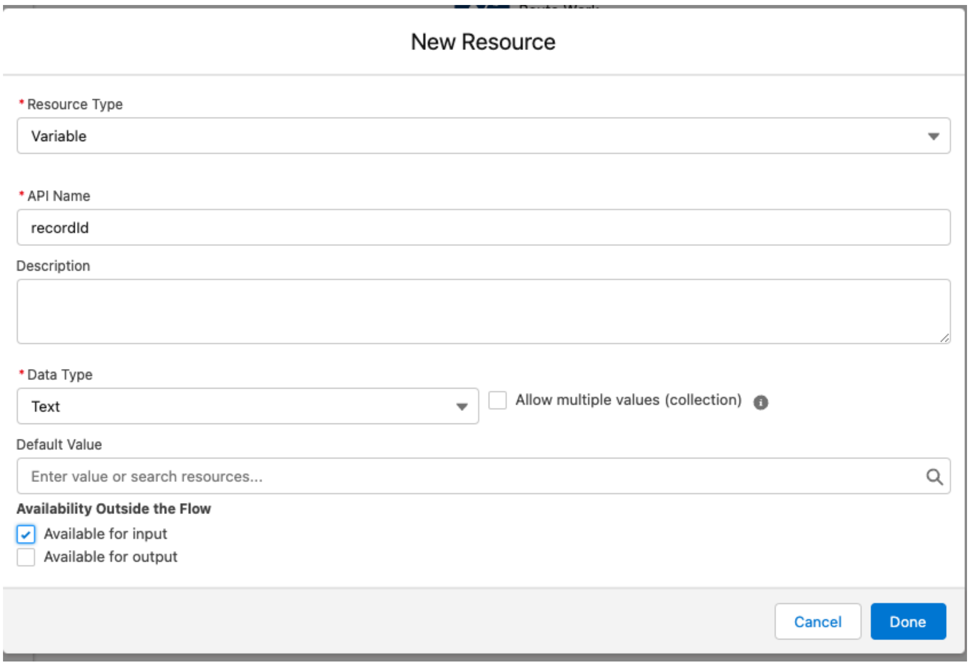


Addd a new `Resource` of type `Variable` called `input_record` of type `genesysps__Experience__c` :

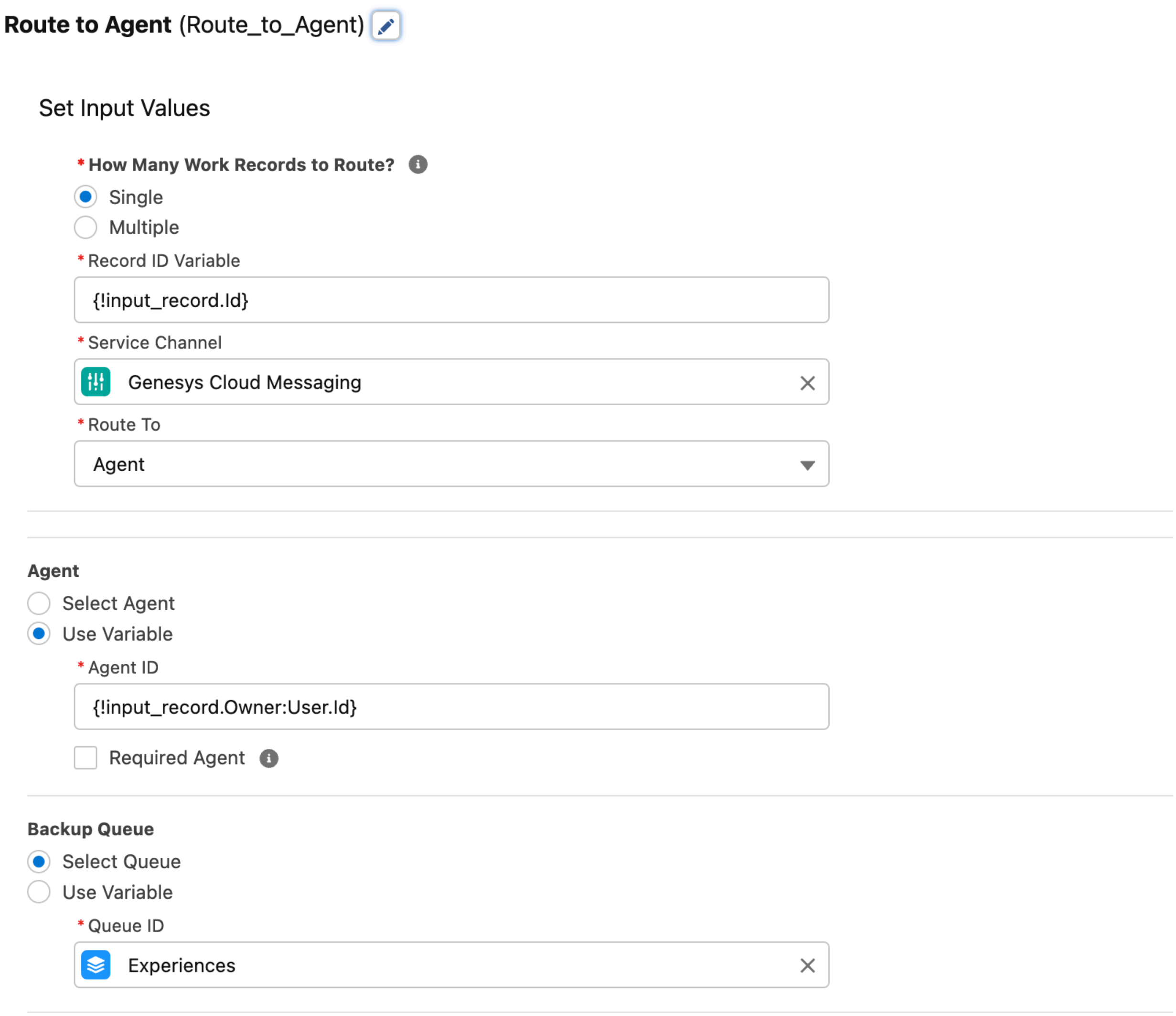


Note: Make sure to check the `Available for input` checkbox.

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



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

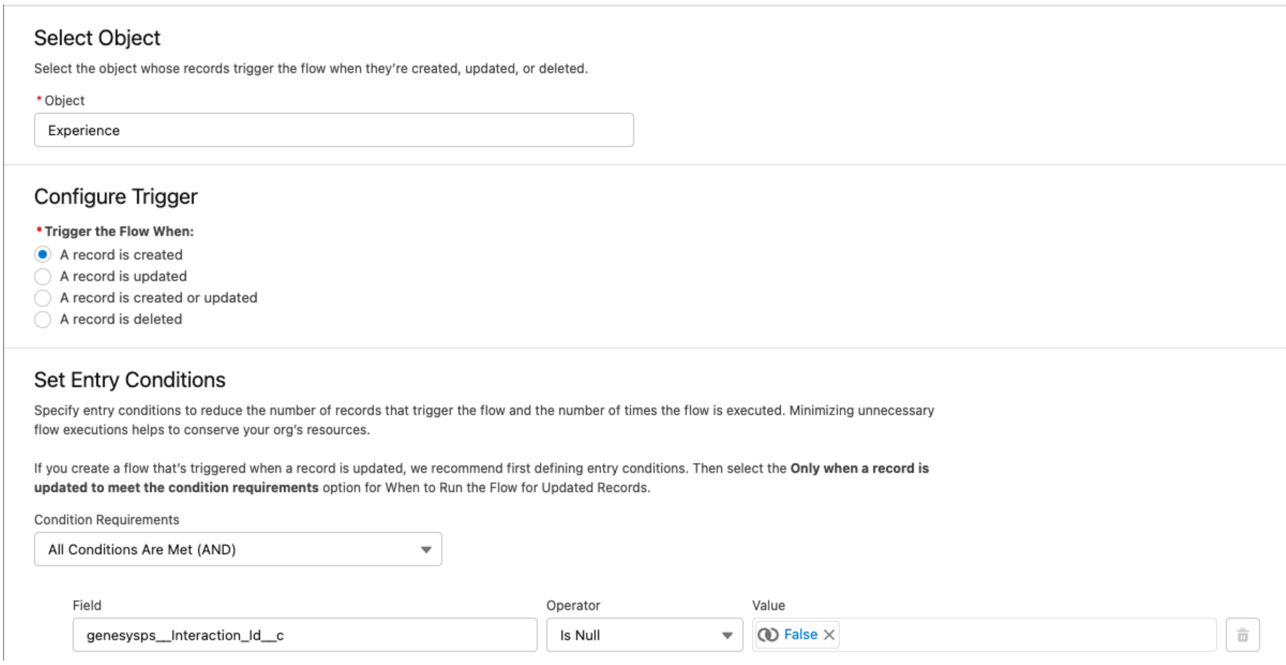


The flow should look like this:

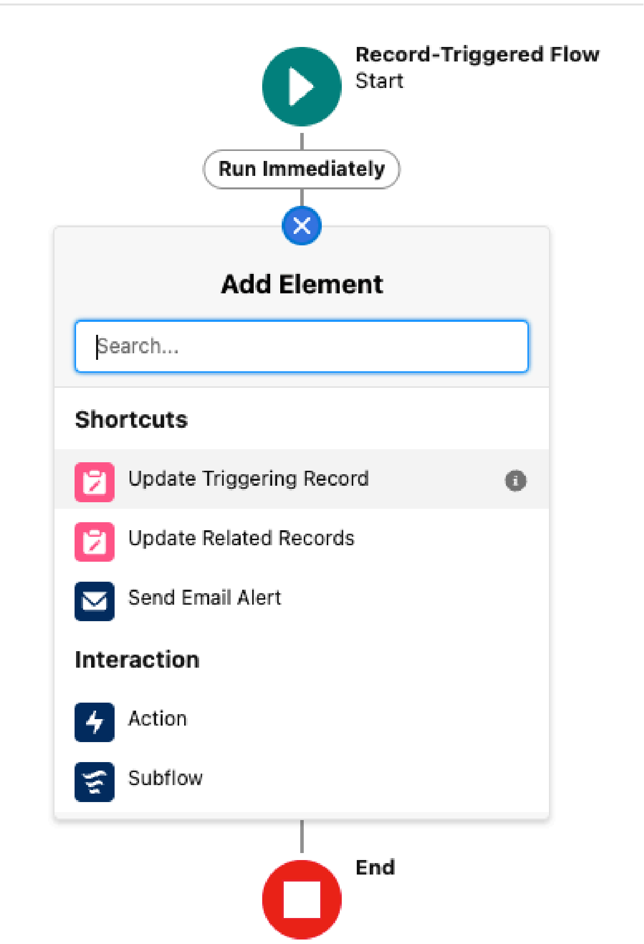
Save it as `Pop Experience to Agent` and activate the flow.

Create the Flow to route the Experience to an agent

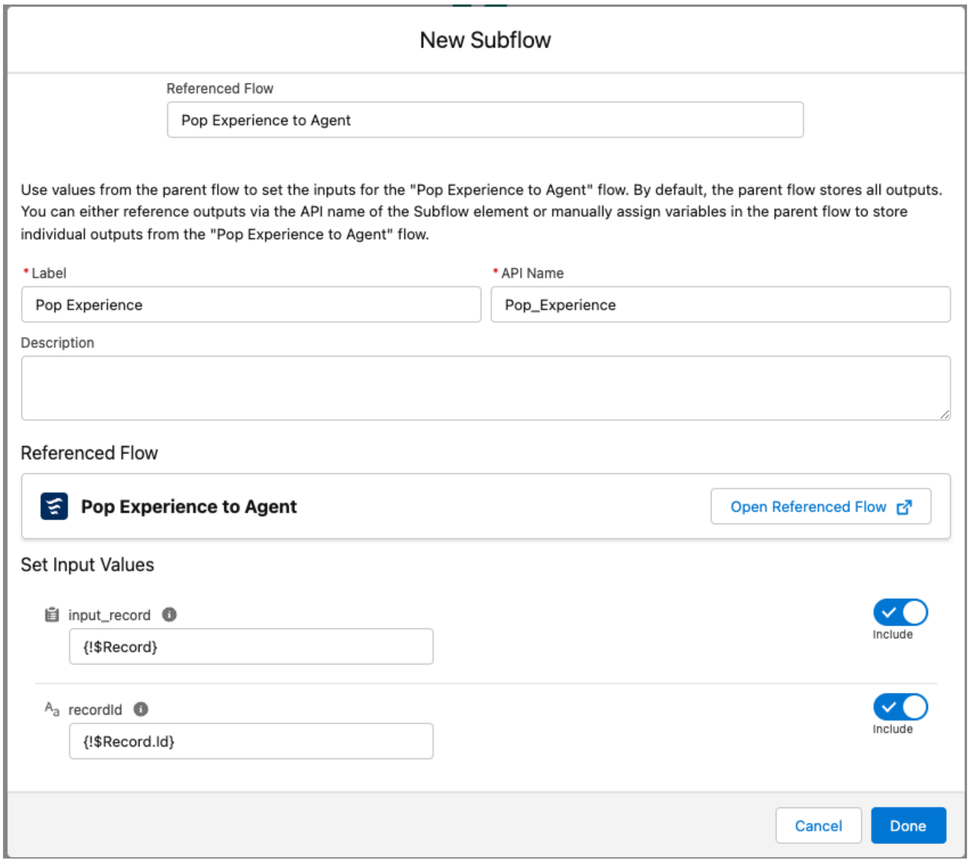
On the setup screen, search for `Flows` and click on `New Flow`. Select `Record-Triggered Flow` and click on `Create`. Then, search for `Experience` as the triggering object. The Entry Conditions should be set to `All Conditions are Met (AND)` the condition set as follows:



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



And configure the subflow as follows:



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.

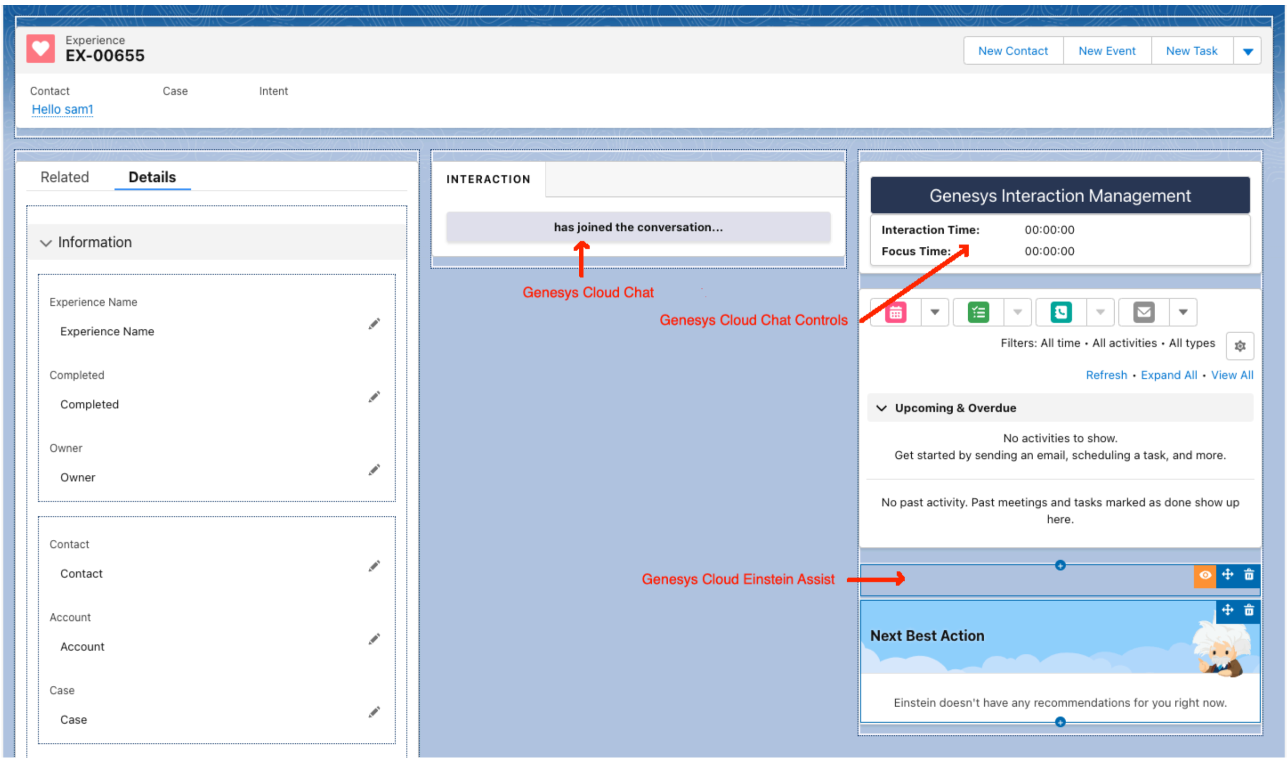
For an optimal experience, we recommend the following components:

- 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:

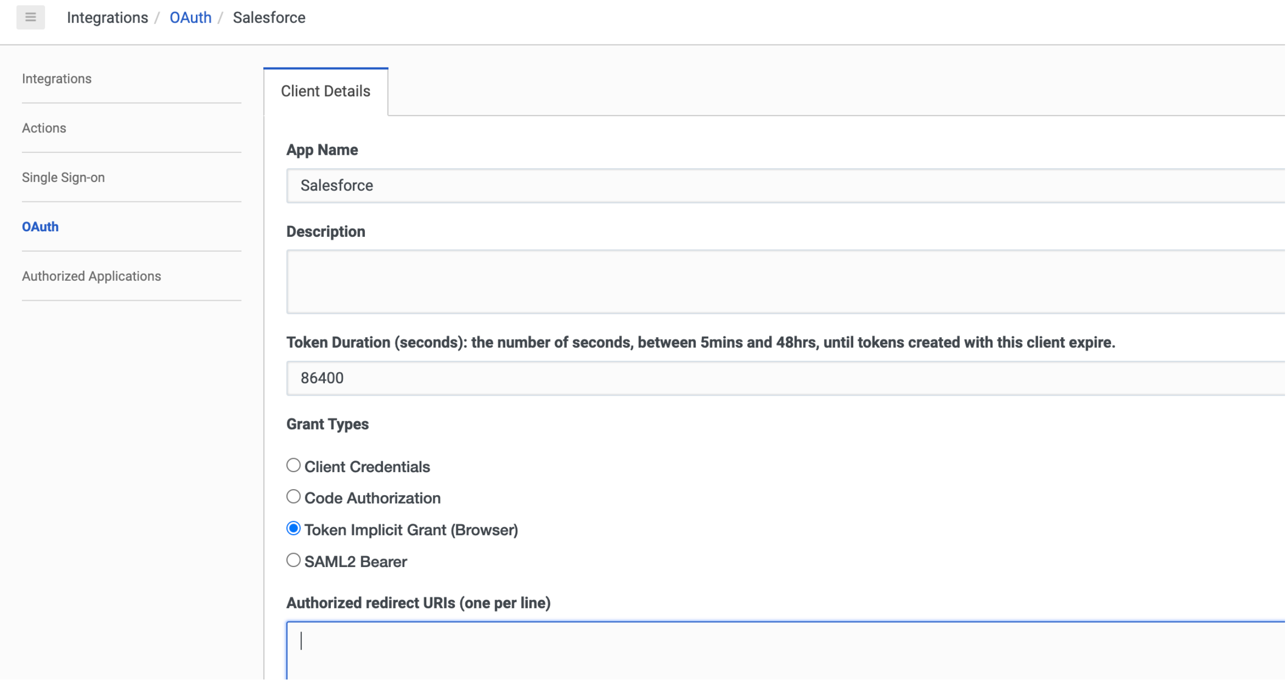
- Genesys Cloud Chat Bar Utility
  This component is used in the Utility Bar (where Omni-Channel shows) and should not be added to the Record page.
- Genesys Cloud Transcript
  This component is used to see the transcript of a voice or chat conversation. It is not used on the Experience Record page, 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` :

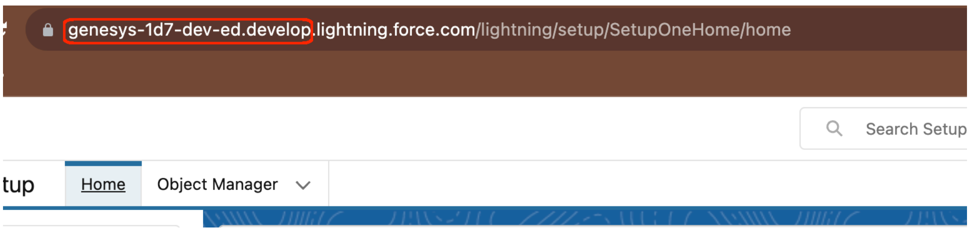


Notes:

- 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
  ```

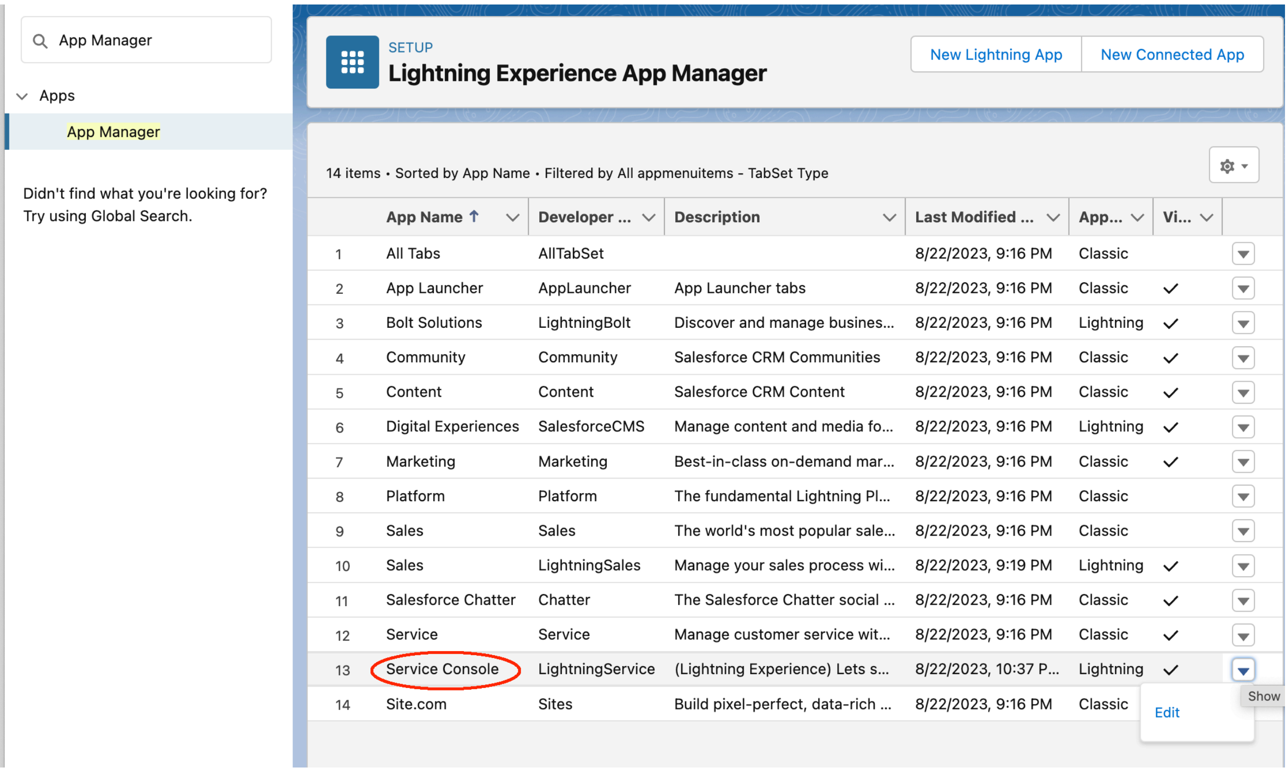
  where `xxxx` is the base name of your org. You can find that name in the URL of your Salesforce org:

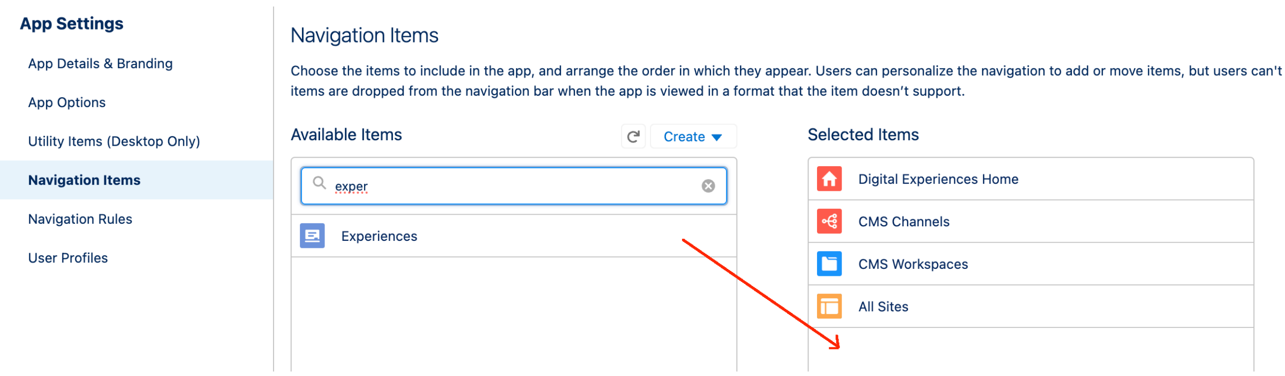
  In this example, the basename is `genesys-1d7-dev-ed.develop` , so the redirect URI in Genesys Cloud should be set to:

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

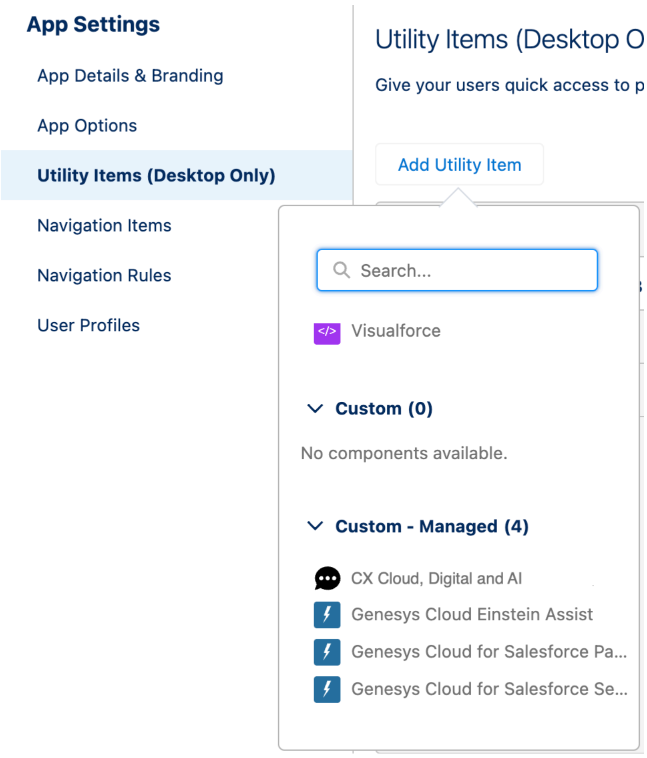
Back on the Salesforce pages, on the setup screen, search for the `App Manager` and choose one of the Lightning apps (you can also create your own), here we will use the `Service Console` app. Click on the `Edit` button:



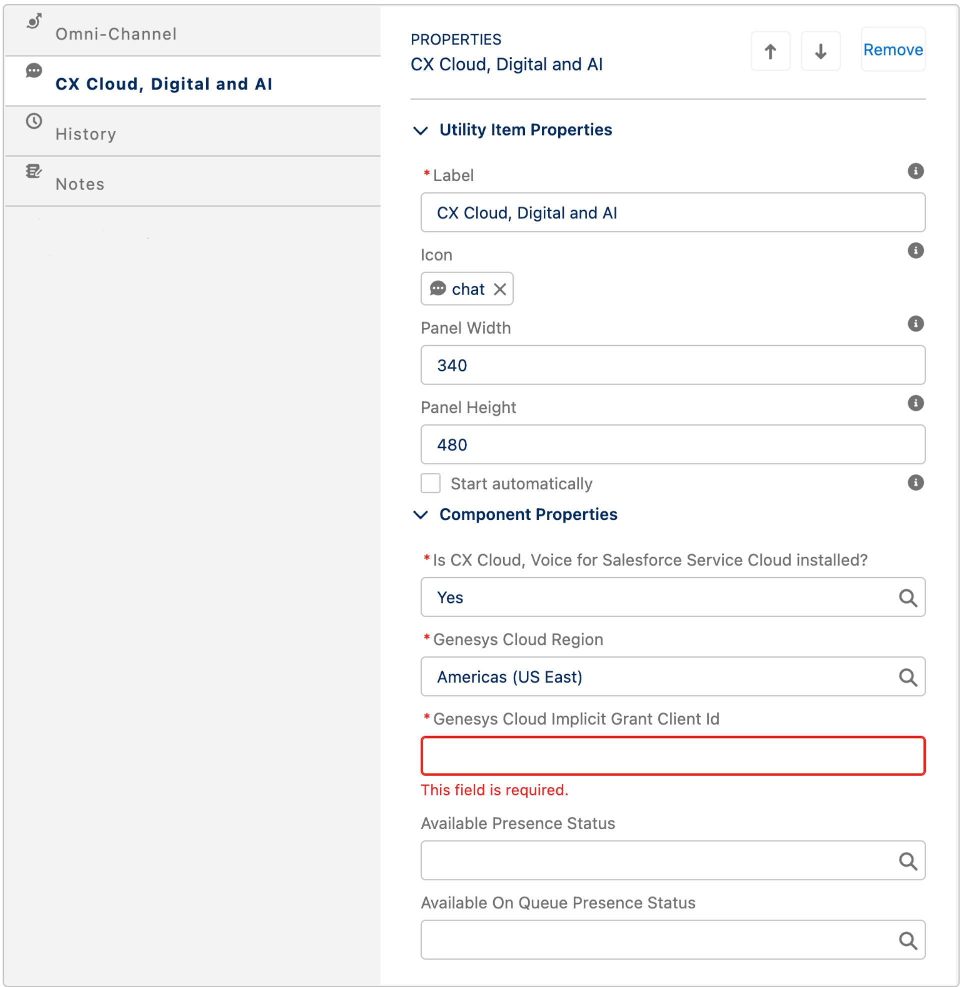
In the Lightning App Builder, click on the `Navigation Items` tab, and add the `Experiences` to the right column (Seleted Items):



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:

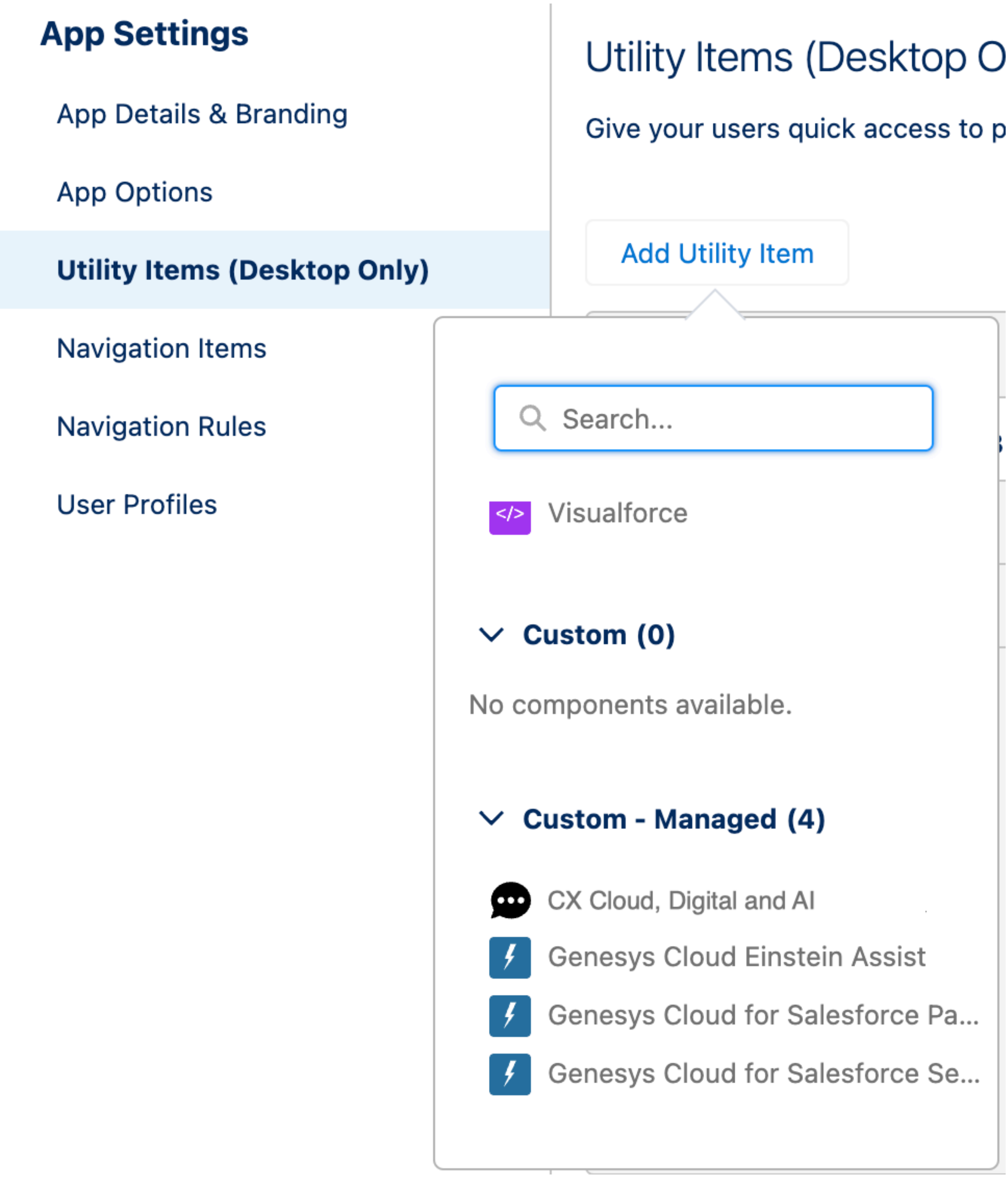


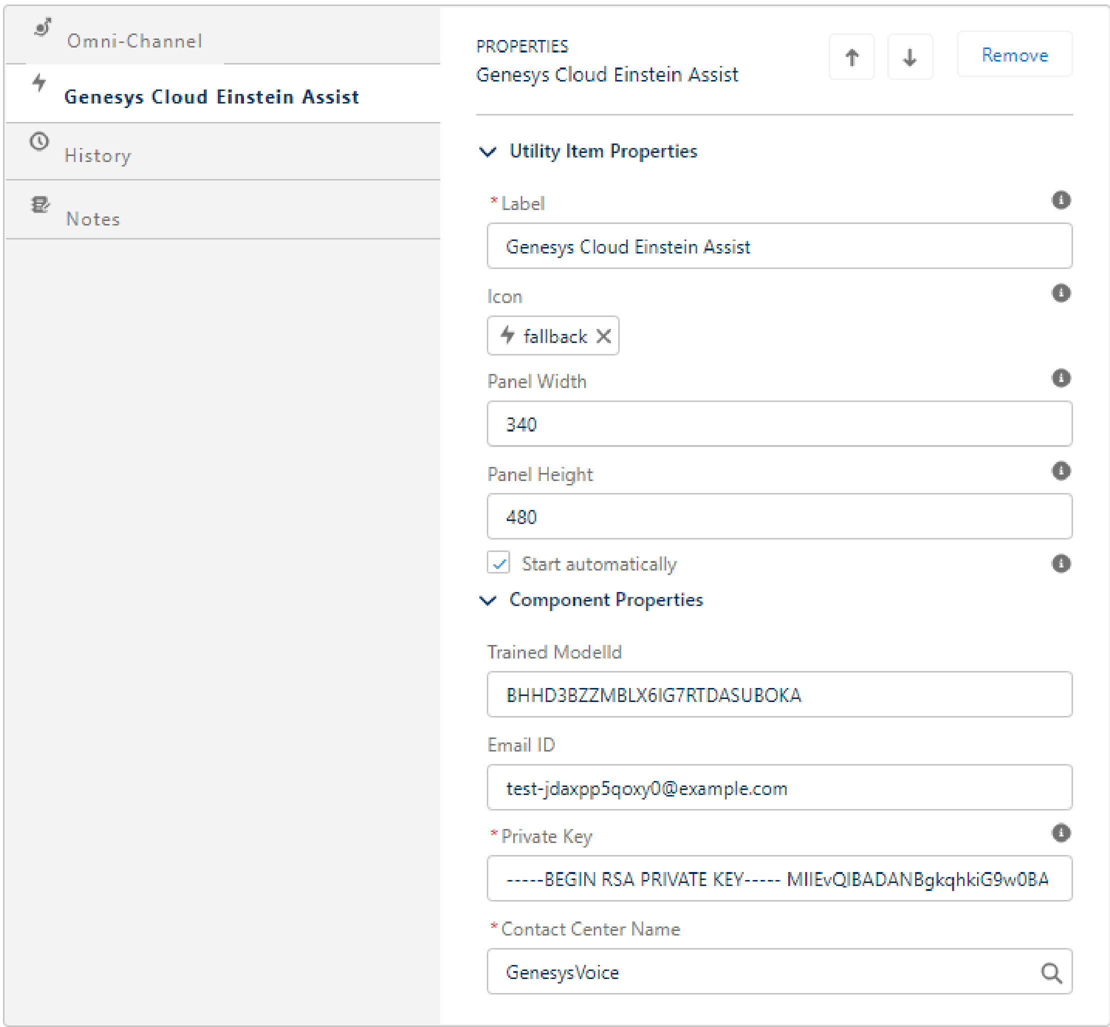
You can also change the label and icon to your liking.

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 `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):





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.

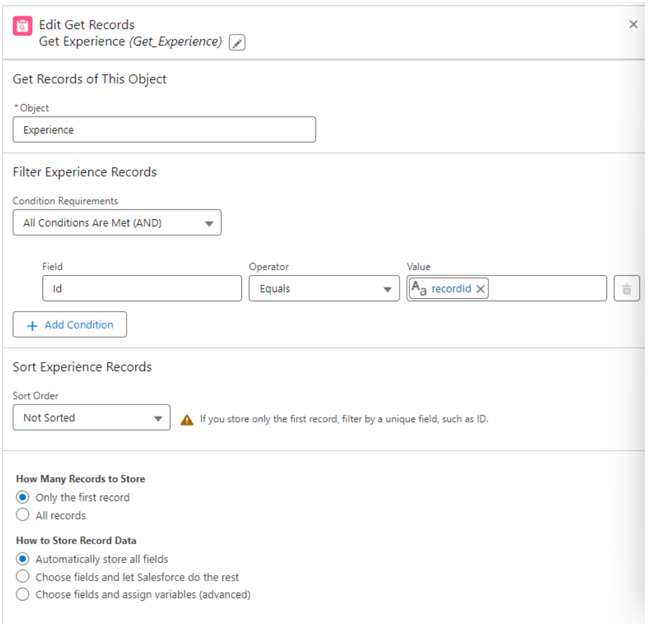
Follow the steps to Create Recommendations.

Create a Recommendation Strategy for Einstein's Next Best Action

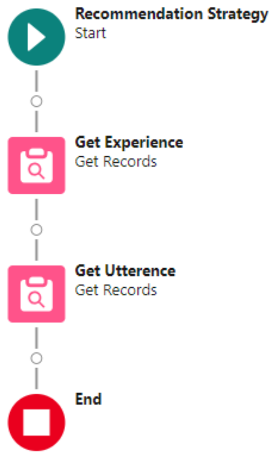
On the setup screen, search for `Process Automation`. Click on `Next Best Action` and create a new strategy. For Voice and Messaging, two different strategies should be created.

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.

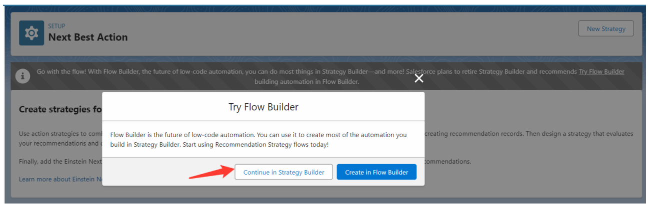


- Choose the Experience object.
- In the 'Filter' section, define conditions to filter the records from your chosen object for the strategy.
- Add another 'Get Records' element to bring a specific recommendation into your strategy. Again, set a label and an API name.
- Select the 'Recommendations' object.
- 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.

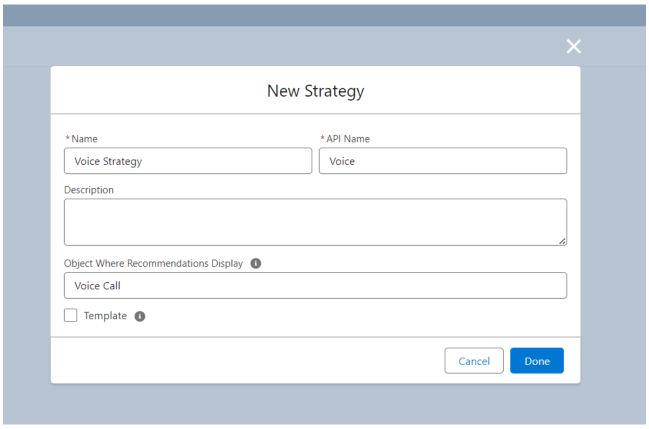


- Finally, activate your flow.

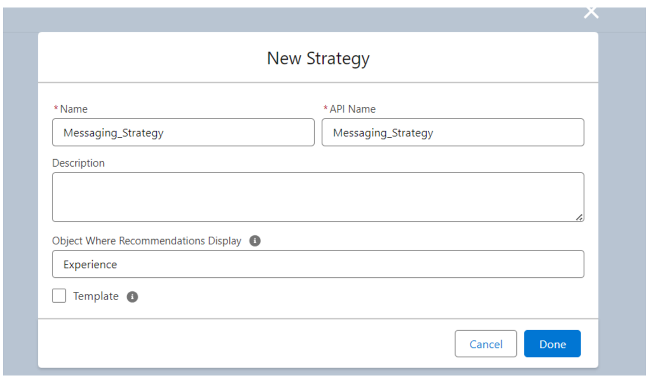
Select `Continue in Strategy Builder`



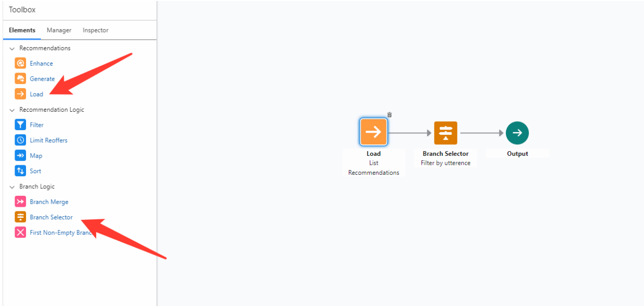
For VoiceCall: Select the `VoiceCall` Object.



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”

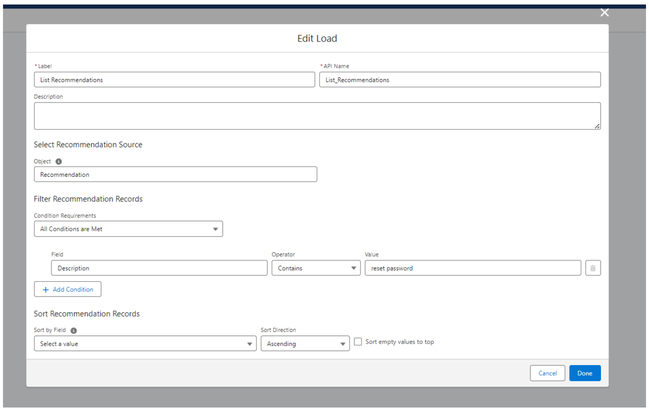
Field:

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



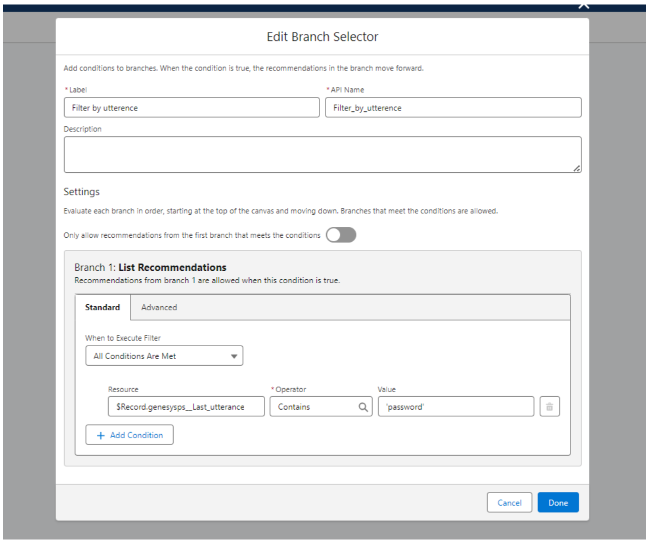
Branch Selector (Filter by utterance): Evaluate user input (e.g., Last utterance) and determine the appropriate branch or recommendation logic to follow.

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”

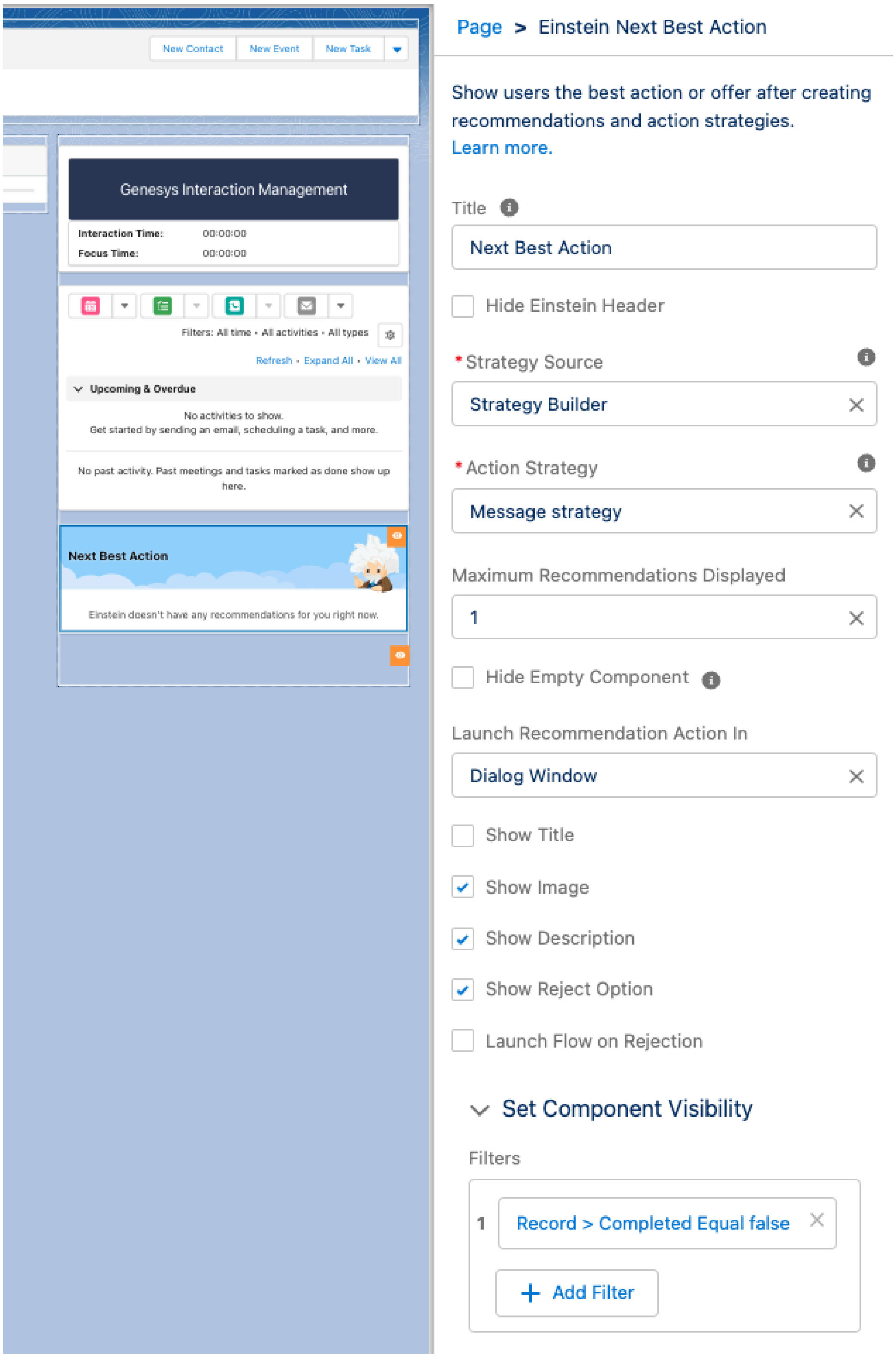
Value:
Purpose: The content against which the Resource will be evaluated based on the Operator.
Input Type: Text
Example Value: “password”

Add Condition: Button to incorporate additional filter conditions.



Save the Strategy

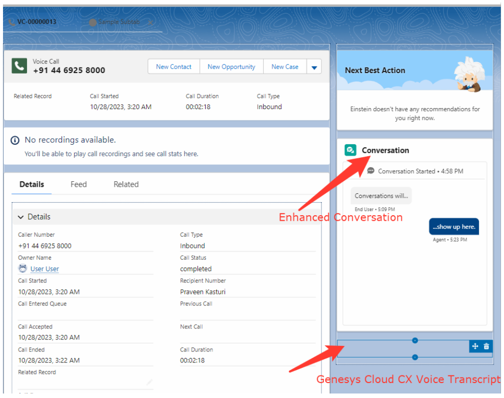
In the `VoiceCall` or `Experience` page, add an Einstein `Next Best Action` component and set its Action Strategy to the `Recommendation Strategy` you just created:



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:

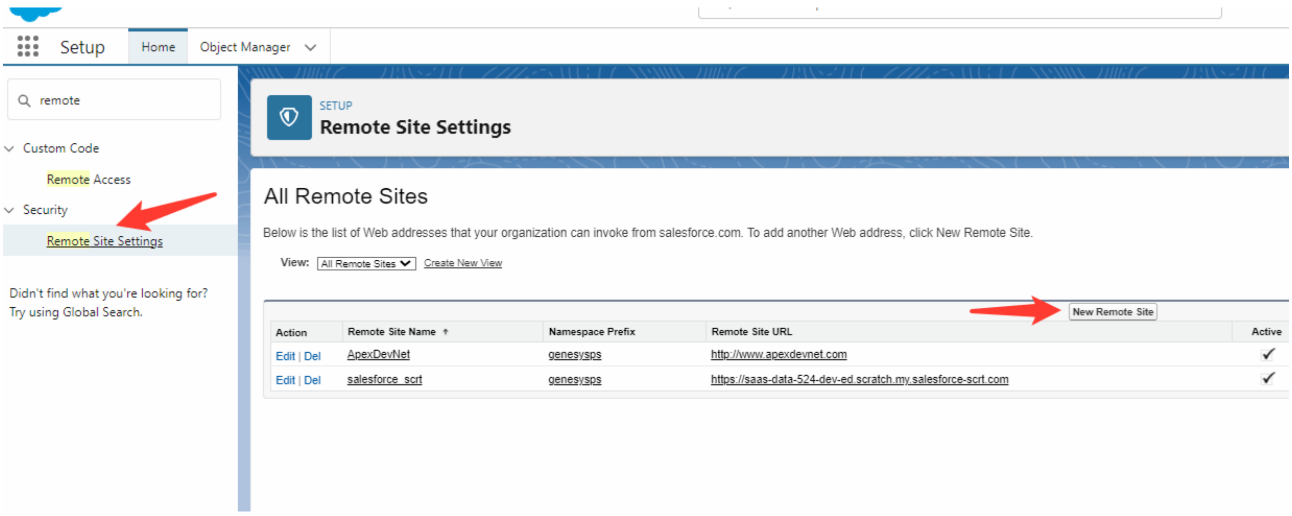
- Go to Setup in Salesforce.
- In the Quick Find box, enter “Lightning App Builder.”
- Click “Lightning App Builder” under User Interface.
- In the Lightning App Builder, select the VoiceCall record page
- In the App Builder, add the following components:
  - Enhanced Conversation (Standard Salesforce 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



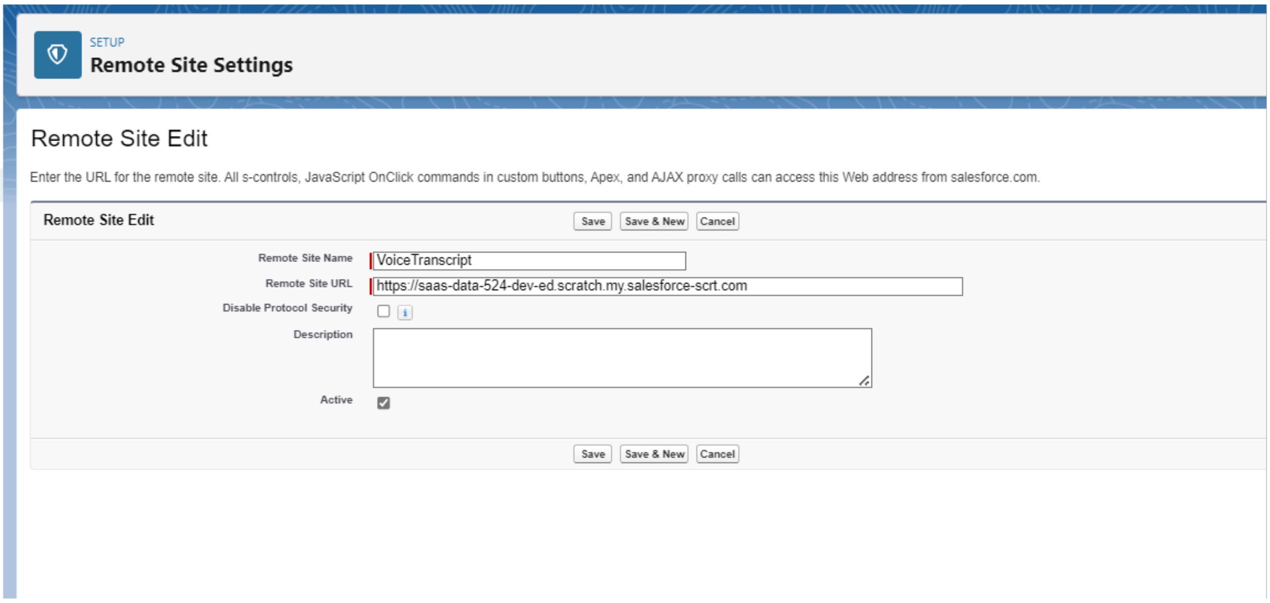
To modify your Salesforce domain URL and replace "lightning.force.com" with ".my.salesforce-scrt.com", follow these steps:

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.

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: