

CX Cloud External Routing for Salesforce Service Cloud Installation Guide

Prerequisites

Salesforce Setup

Ensure that you have the following items set up in Salesforce:

1. **Enable Omni-Channel Settings:** Refer to the Enable Omni-Channel documentation.
2. **Create Service Channels:** Follow the steps in the Create Service Channels guide.
3. **Create OAuth Client Credentials:** See the Configure Authentication instructions.
4. **Map Omni-Channel Statuses to Genesys Cloud Statuses:** Follow the steps in the Configure Omni-Channel Sync guide.

Genesys Cloud Setup

Ensure that you have the following items set up in Genesys Cloud:

1. **Open Messaging Integrations:** Refer to the About Open Messaging documentation.
2. **Webhook URL and Secret Token:** While external routing does not require the URL and secret token, you must populate them during the configuration of the open messaging integration.

Add Service Channel to Presence Configuration

1. **Access Presence Configurations:**
 - In **Setup**, enter **Presence Configurations** in the **Quick Find** box.
 - Select **Presence Configurations**.
2. **Create or Edit a Presence Configuration:**
 - Click **New** to create a new presence configuration, or click **Edit** next to an existing one to modify it.
3. **Assign Service Channels:**
 - In the **Service Channels** section, click **Add Service Channels**.
 - Select the service channels you created in the previous step from the list.
 - Click **Add** to include them in the presence configuration.
4. **Configure Capacity and Skills (Optional):**
 - Specify the maximum capacity for the presence configuration.
 - Optionally, define skill requirements for handling different service channels.
5. **Save the Presence Configuration:**
 - Click **Save** to apply the changes.

4. Assign Presence Configuration to Users

1. **Access Users:**
 - In **Setup**, enter **Users** in the **Quick Find** box.
 - Select **Users**.
2. **Assign Presence Configuration:**
 - Click on the user you want to assign the presence configuration to.
 - Scroll down to the **Omni-Channel Settings** section.
 - Select the appropriate **Presence Configuration** from the dropdown menu.
3. **Save User Settings:**
 - Click **Save** to update the user's settings.

Lightning Component tabs:

Create the following Lightning Component tabs:

1. Navigate to **Salesforce Setup**.
2. In the **Quick Find** box, enter **Tabs**.
3. Click on **Lightning Component Tabs**.
4. Click **New**.
5. For the **Lightning Component**, select `genesysps:ExternalRoutingSettings`.
6. Click **Next** and follow the prompts to create the tab.
7. Repeat the process for the **Lightning Component** `genesysps:gcxoauthSettings`.

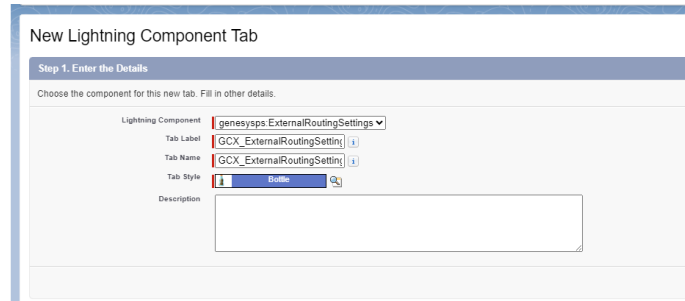


Figure 1: OAuth Setup

Add the lightning tabs to the Application in App Manager

Genesys Cloud OAuth Integration Permission.

To connect to Genesys Cloud CX, you will need credentials from an OAUTH Integration with “Client Credentials” grant type. The mandatory permis-

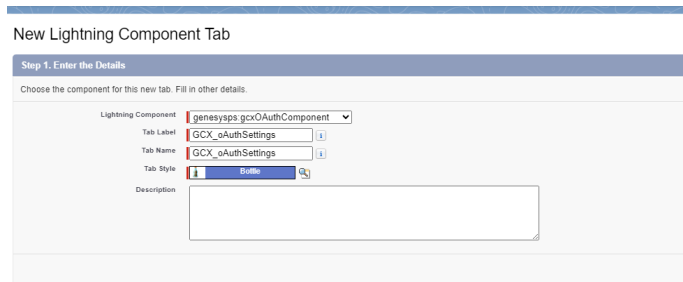


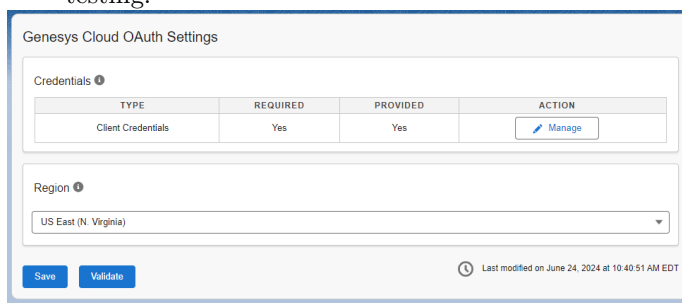
Figure 2: OAuth Setup

sions are: messaging:integration:*, conversation:communication:view, conversation:message:{receive,create,view},conversation:participant:wrapup,routing:queue:view

OAuth Setup

Some features in Genesys Cloud for Salesforce require OAuth authentication. To set up OAuth, follow these steps:

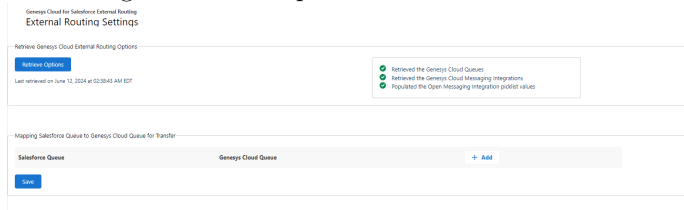
1. **Open Integration Settings:**
 - On the Visualforce page, navigate to the **Integration Settings** section to manage OAuth configuration.
2. **Edit Authentication:**
 - In the Authentication section, click **Edit**.
 - Enter the **Client ID** and **Client Secret** from your OAuth client in Genesys Cloud.
 - Click **Save** to store these credentials securely.
3. **Select Genesys Cloud Region:**
 - Choose the appropriate **Region** for your Genesys Cloud organization.
 - If you change the **Region**, ensure you click **Save** again to apply the changes.
4. **Test the Configuration:**
 - Click **Validate** to verify that the OAuth setup is correctly configured.
 - Note: If you change the **Region**, ensure you save the changes before testing.



External Routing Settings

To configure the external routing settings and sync data between Genesys Cloud and Salesforce:

- 1. Access External Routing Settings:**
 - On the Visualforce page, navigate to the **External Routing Settings** section.
- 2. Retrieve Configuration:**
 - Click on **Retrieve Options** to fetch configuration data from Genesys Cloud.
 - The integration will query Genesys Cloud for queues and messaging integrations.
 - It will then sync these objects from your Genesys Cloud organization to your Salesforce organization, ensuring that all necessary routing configurations are up-to-date.



By following these steps, you will set up and configure the Genesys integration in Salesforce, enabling enhanced features and efficient data synchronization between the two platforms.

Create a Routing Configuration

To effectively manage how incoming customer interactions are routed in Salesforce, you need to create a routing configuration. This configuration ensures that interactions are handled according to your specified rules and priorities.

Follow these steps to create a routing configuration:

- 1. Navigate to Routing Configurations:**
 - Go to the Salesforce setup screen.
 - Use the search bar to find **Routing Configurations**.
 - Click on **Routing Configurations** to open the configuration page.
- 2. Create a New Routing Configuration:**
 - Click the **New** button to start creating a new routing configuration.
- 3. Set Up the Routing Configuration:**
 - In the configuration details:
 - **Name:** Enter **ExternalRouting**.
 - **Priority:** Set the priority to **1**.
 - **Routing Model:** Choose **External Routing** as the model.
- 4. Save the Configuration:**

Routing Configurations

The routing priority determines the order in which work items are pushed to agents. Higher priority work is pushed before lower priority work. For example, work that's Priority=1 is considered to have a higher priority.

The routing model determines how to distribute work items to your agents. It acts as a tiebreaker if two or more agents qualify to take on the same work item. The Least Active routing model routes work to the agent Available routing model routes to the agent with the greatest difference 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 access to the object types in your queues and set an overflow assignee to every routing configuration, overflow assignee access is required.

Routing Settings

The routing priority determines the order in which work items across your Omni-Channel queues get pushed to your agents. Lower-priority items are pushed first.

The routing model determines how to evenly distribute work items to your agents. It acts as a tiebreaker if two or more agents qualify to take on the same work item. Least Active routes to the agent with the fewest open work items. Available routes to the agent with the most open capacity in proportion to their set capacity.

Routing Priority:

Routing Model:

Push Time-Out (seconds):

Capacity Type:

Work Item Size

Specify the size of the work items in the **queue** associated with this configuration. You can size items by number of units or percentage of the agents capacity, but not both.

Units of Capacity:

Percentage of Capacity:

Figure 3: Routing Configuration

- After entering all the necessary details, click **Save** to create the new routing configuration.

By setting up the **ExternalRouting** routing configuration with a priority of 1 and the external routing model, you prioritize these interactions to be managed by external systems like Genesys Cloud, ensuring they are processed according to your integration setup.

Create a Queue

To manage the distribution of work among your agents effectively, you need to create a queue in Salesforce. This queue will utilize the routing configuration you created earlier and handle specific objects. Follow these steps to set up the queue:

- 1. Navigate to Queue Settings:**
 - In the Salesforce setup screen, use the search bar to find **Queues**.
 - Click on **Queues** to open the queue configuration page.
- 2. Create a New Queue:**
 - Click the **New** button to start creating a new queue.
- 3. Configure the Queue:**
 - In the queue configuration form:
 - **Queue Label:** Enter a name for the queue, such as **Customer Support Queue**.
 - **Queue Name:** This will auto-populate based on the Queue Label. You can adjust it if necessary.
 - **Routing Configuration:** Select the **ExternalRouting** routing configuration that you created earlier.

- **Supported Objects:** Choose the Salesforce objects that this queue will handle. For example, you might select **Cases**, **Leads**, or **MessagingSessions**.

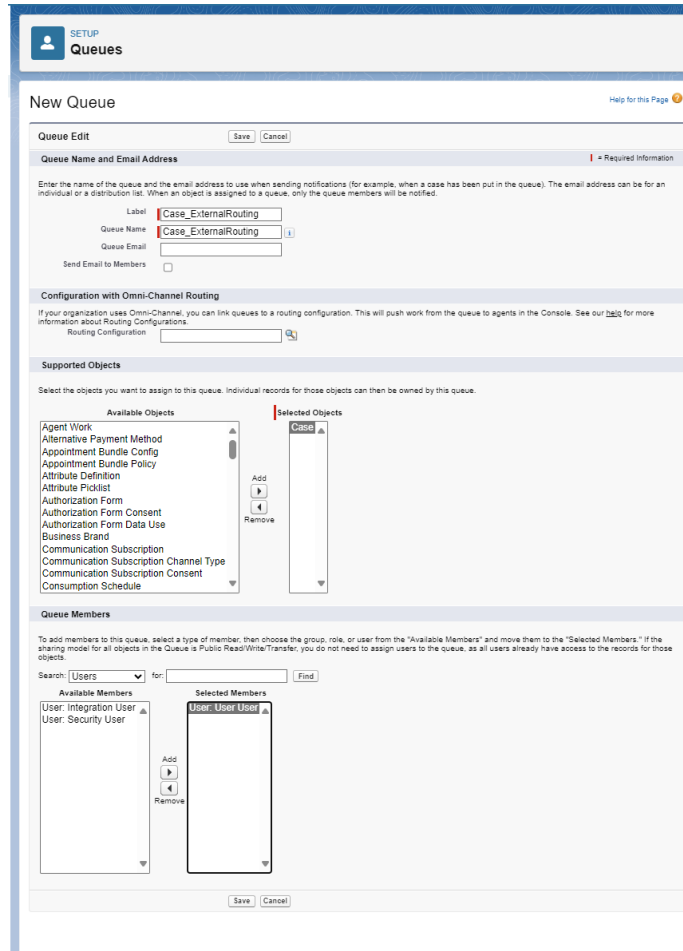


Figure 4: Queue Configuration

4. Assign Members to the Queue:

- In the queue members section, add the users, public groups, roles, or territories that should be able to process items in this queue.
- Click **Add** after selecting the appropriate members.

5. Save the Queue:

- After entering all the required details and assigning members, click **Save** to create the new queue.

By setting up this queue and associating it with the **ExternalRouting** routing configuration, you ensure that the interactions routed to this queue are man-

aged according to the defined priorities and models. This setup streamlines the process of handling incoming interactions, allowing for efficient distribution among agents.

Create an Omni-Channel Flow

Creating an Omni-Channel Flow in Salesforce helps automate the routing process for incoming interactions, ensuring they are directed to the appropriate queues and handled efficiently. Follow these steps to set up an Omni-Channel Flow using the provided template:

1. **Access Flows in Salesforce:**
 - Navigate to the Salesforce setup screen.
 - In the Quick Find box, type **Flows** and select it from the list.
2. **Create a New Flow:**
 - Click the **New Flow** button to start creating a new flow.
3. **Select the Omni-Channel Flow Template:**
 - Click on **All + Templates**.
 - Locate and select the **Omni-Channel Flow** template.
 - Click **Next**.
4. **Choose a Flow Type:**
 - Select **Freeform** to build the flow in a flexible layout.
 - Click **Create** to proceed.
5. **Define Flow Variables:**
 - Create the required variables to hold specific data used within the flow. Follow these guidelines from the Salesforce documentation:
 - **recordId**: This variable will hold the unique identifier for the record being processed. Detailed steps to create this variable are available in the Salesforce guide for `recordId`.
 - **input_record**: This variable will store the record data to be routed. Detailed steps to create this variable are available in the Salesforce guide for `input_record`.
6. **Add the Route Work Action:**
 - Drag the **Route Work** action from the palette onto the flow canvas.
 - Configure the **Route Work** action:
 - **Label**: Enter a descriptive label, such as **Route Customer Support Request**.
 - **Description**: Optionally, enter a description for this action.
 - Set the input values for the action:
 - **RecordID**: Select the `recordId` variable you created earlier.
 - **Service Channel**: Choose the service channel you created for chats.
 - **Route To**: Select **Queue**.
 - **Queue**: Choose the Salesforce queue created on the earlier steps.
 - Click **Done** to save the configuration for this action.
7. **Add the Create Records Action:**

- Drag the **Create Records** action onto the canvas.
- Configure the **Create Records** action:
 - **Label:** Enter a name such as **Create External Routing Request**.
 - **Number of Records:** Choose **One** to create a single record.
 - **How to Set Record Fields:** Select **Use separate resources, and literal values** to manually set the fields.
 - **Object:** Select **External_Routing_Request** from the list of objects.
- Set the field values for the new record:
 - ****Open_Messaging_Integration__c**:** Choose the appropriate value from the picklist retrieved from Genesys Cloud.
 - ****Work_Item_ID__c**:** Assign the **recordId** variable to this field, which corresponds to the Service Channel object.

The screenshot shows a configuration window titled "Edit Create Records" for the object "External_Routing_Request". The window is divided into several sections:

- How Many Records to Create:** Two radio buttons are present: "One" (selected) and "Multiple".
- How to Set the Record Fields:** Two radio buttons are present: "Use all values from a record" and "Use separate resources, and literal values" (selected).
- Create a Record of This Object:** A dropdown menu labeled "*Object" is set to "External_Routing_Request".
- Set Field Values for the External_Routing_Request:** This section contains two rows of field-value assignments:
 - Field: "genesysps__Open_Messaging_Integration__c" is assigned the value "Praveen - Open Messaging".
 - Field: "genesysps__Work_Item_ID__c" is assigned the value "recordId".
- At the bottom, there is a "+ Add Field" button and a checkbox labeled "Manually assign variables" which is currently unchecked.

Figure 5: Omni-Channel Create Record

8. Save and Activate the Flow:

- After configuring the flow, click **Save** to store your changes.
- Provide a name and description for the flow.
- Click **Activate** to put the flow into operation.

By following these steps, you will create an Omni-Channel Flow that automates the routing of work items. This setup ensures interactions are effectively managed and directed to the appropriate queues and agents, enhancing operational efficiency.

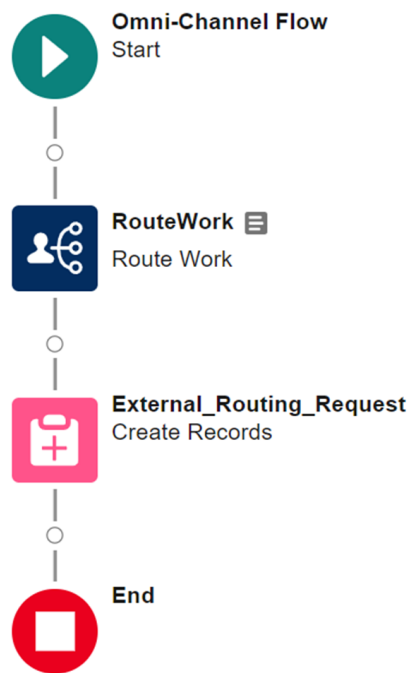


Figure 6: OmniChannel Flow

Configure the Screen Pop

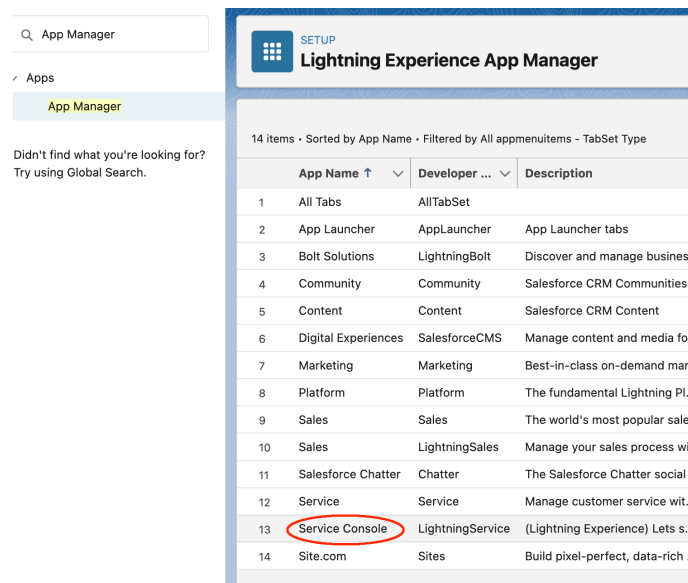
A screen pop is a feature that automatically displays relevant information to agents when they receive an interaction, improving efficiency and response times. To set up a screen pop in Salesforce using the CX Cloud, External Routing component, follow these steps:

1. Access the App Manager:

- In Salesforce, go to the setup screen.
- Use the Quick Find box to search for **App Manager**.
- Click on **App Manager** to see the list of available apps.

2. Select and Edit a Lightning App:

- From the list of apps, find the **Service Console** app (or another Lightning app of your choice).
- Click on the **Edit** button next to the selected app to open the Lightning App Builder.



	App Name ↑	Developer ...	Description
1	All Tabs	AllTabSet	
2	App Launcher	AppLauncher	App Launcher tabs
3	Bolt Solutions	LightningBolt	Discover and manage busines...
4	Community	Community	Salesforce CRM Communities
5	Content	Content	Salesforce CRM Content
6	Digital Experiences	SalesforceCMS	Manage content and media fo...
7	Marketing	Marketing	Best-in-class on-demand mar...
8	Platform	Platform	The fundamental Lightning PL...
9	Sales	Sales	The world's most popular sale...
10	Sales	LightningSales	Manage your sales process wi...
11	Salesforce Chatter	Chatter	The Salesforce Chatter social ...
12	Service	Service	Manage customer service wit...
13	Service Console	LightningService	(Lightning Experience) Lets s...
14	Site.com	Sites	Build pixel-perfect, data-rich ...

Figure 7: List Applications

3. Configure the Utility Bar:

- In the Lightning App Builder, go to the **Utility Items** tab.
- Click **Add Utility Item** to include a new component in the utility bar.

4. Add the CX Cloud Component:

- From the list of available components, select **CX Cloud, External Routing**.
- This component will be added to the utility bar at the bottom of the screen.

PROPERTIES
CX Cloud, External Routing

Utility Item Properties

* Label
CX Cloud, External Routing

Icon
⚡ fallback ×

Panel Width
340

Panel Height
480

Start automatically

Component Properties

* Genesys Cloud Region
Americas (US East)

* Genesys Cloud Implicit Grant Client Id
d4dfa94d-d68a-417f-800c-baf332b178c1

Figure 8: Add Utility Item

5. Set Component Properties:

- In the properties panel, fill in the necessary details for the **CX Cloud, External Routing** component:
 - **Region:** Enter the region of your Genesys Cloud organization (e.g., `us-east-1`, `eu-west-1`).
 - **Client ID:** Provide the Client ID from your Genesys Cloud OAuth Implicit Grant setup.

6. Enable Automatic Start:

- Ensure that the **Start Automatically** checkbox is checked. This setting makes the component start automatically when the app is launched.

7. Save and Finish:

- After configuring the component properties, click **Save** in the Lightning App Builder.
- Click **Back** to return to the App Manager and complete the configuration.

By following these steps, you will add the **CX Cloud, External Routing** component to your Salesforce app. This setup will enable screen pops, providing agents with immediate access to critical information when they receive interactions, thereby enhancing their efficiency and customer service capabilities.

Ready for Testing

After completing the configuration steps for setting up the Genesys integration, Omni-Channel flow, and screen pop, your Salesforce environment is ready for testing

Setting Up Digital Experience with Messaging in Salesforce

Digital Experience in Salesforce allows you to create a seamless customer interaction platform through various channels, including in-app and web messaging. Follow these steps to enable Digital Experience and set up messaging channels for customer engagement.

1. Enable Digital Experience

1. **Navigate to Digital Experience Settings:**
 - Go to **Setup**.
 - In the **Quick Find** box, type **Digital Experience**.
 - Select **Settings** under **Digital Experience**.
2. **Enable Digital Experience:**
 - Click **Enable Digital Experience**.
 - Confirm the action if prompted.

2. Add a Messaging Channel

1. **Access Messaging Settings:**
 - Go to **Setup**.
 - In the **Quick Find** box, type **Messaging Settings**.
 - Select **Messaging Settings**.
2. **Create a New Messaging Channel:**
 - Click **New Channel**.
 - Choose **Messaging for In-App and Web**.
3. **Configure the Channel:**
 - Provide a **Channel Name**.
 - Click **Save**.

3. Set Up Embedded Service Deployment

1. **Navigate to Embedded Service Deployment:**
 - Go to **Setup**.
 - In the **Quick Find** box, type **Embedded Service Deployment**.
 - Select **Embedded Service Deployment**.
2. **Create a New Deployment:**
 - Click **New Deployment**.

- Select **Messaging for In-App and Web**.
 - Choose **Web** for the deployment type.
3. **Configure the Deployment:**
 - Provide an **Embedded Service Deployment Name**.
 - Set the **Domain** as *.sites.com.
 - Select the **Messaging Channel** you created in the previous step.
 4. **Publish the Deployment:**
 - Once all the details are filled in, complete the setup process.
 - Publish the deployment to make it live.

4. Test Messaging

1. **Enable Test Messaging:**
 - After completing the deployment, the **Test Messaging** option will become active.
 - Click on the **Test Messaging** tile.
2. **Verify the Chat Interface:**
 - A new web page will open.
 - Look for the chat icon popup on the page, which indicates that the messaging channel is functioning correctly.

Reference Links

- [Salesforce In-App Messaging Overview](#)
- [Salesforce Messaging Setup Stages](#)

Setting Up Email-to-Case in Salesforce

Email-to-Case is a powerful Salesforce feature that automates the creation of cases from customer emails. This helps streamline your support processes and ensures timely responses to customer inquiries. Follow these steps to set up and configure Email-to-Case:

1. Enable Email-to-Case

1. **Navigate to Email-to-Case:**
 - Go to Setup.
 - Enter **Email-to-Case** in the Quick Find box.
 - Select **Email-to-Case**.
2. **Enable Email-to-Case:**
 - Click **Edit**.
 - Check **Enable Email-to-Case**.
 - Click **Save**.
3. **Enable On-Demand Service:**
 - Check **Enable On-Demand Service**.

- Click **Save**.
- This setting allows Salesforce to handle incoming emails for case creation.

2. Configure Email-to-Case

To tailor how Salesforce processes and creates cases from emails, configure your Email-to-Case settings:

- Refer to Salesforce Email-to-Case Configuration Guide for detailed instructions.

3. Add Routing Addresses for Email-to-Case

Setting up routing addresses allows Salesforce to process emails sent to specified support addresses and create cases. Follow these steps:

1. **Set Up Routing Addresses:**
 - Define and configure the email addresses where customers send their inquiries.
 - Salesforce will monitor these addresses and create cases when an email is detected in the To, CC, or BCC fields.
2. **Refer to the Guide:**
 - For detailed steps, consult the Salesforce Routing Address Configuration Guide.

Assign an Omni-Channel Flow to Route Cases

Using Omni-Channel flow for routing cases from Email-to-Case is recommended for efficient case management. This method provides flexibility and avoids conflicts with other case assignment rules.

1. **Set Permissions:**
 - Ensure the automated case user has **Run Flows** or **Manage Flows** permission.
 - This user can be defined in Setup under **Support Settings**.
2. **Create or Edit Routing Addresses:**
 - Go to Setup.
 - Enter **Email-to-Case** in the Quick Find box and select it.
 - Create or edit the routing addresses used for customer inquiries.
 - Ensure these addresses are verified to be used for Omni-Channel flow routing.
3. **Configure Omni-Channel Flow:**
 - Specify the flow designed to handle case routing.
 - Set a fallback queue to ensure cases are assigned even if an exception occurs.
 - The fallback queue should use **Case** as the service channel and have an Omni-Channel routing setup.

4. **Save Settings:**

- Click **Save** to finalize your configuration.

How Email-to-Case Works with Omni-Channel Flow

When a customer sends an email to your specified support address: - **Email-to-Case** automatically creates a case if none exists. - The Omni-Channel flow is executed to route the case to the appropriate queue or agent. - If the flow encounters an error, the case is routed to the defined fallback queue.

Reference Links

- [Setting Up Email-to-Case in Salesforce](#)
- [Customizing Email-to-Case Settings](#)

Transfer Chats

Reference Link

- [Transfer a Chat Overview](#)