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CX Cloud External Routing for Salesforce Service Cloud Installation Guide

Overview

The CX Cloud External Routing for Salesforce Service Cloud is an integration package that connects Salesforce Service Cloud with Genesys Cloud's communication capabilities. This integration enables organizations to leverage Genesys Cloud's robust contact center capabilities while maintaining Salesforce as their primary customer relationship management (CRM) platform.

Key Features: 1. Omni-Channel Integration - Seamlessly routes customer interactions across multiple channels (messaging, email, chat) using Genesys Cloud's routing engine 2. Screen Pop Functionality - Automatically displays relevant workitem information to agents when they receive interactions 3. Digital Experience Support - Enables web and in-app messaging capabilities for customer engagement 4. Email-to-Case Integration - Automates case creation and routing from customer emails 5. Transfer Capabilities - Allows agents to transfer conversations to other queues.

Prerequisites

Before you proceed with the installation, ensure that the following features are activated in your Salesforce organization:

- **Omni-Channel**
- **Service Cloud Voice**

You must also have the CX Cloud from Genesys and Salesforce installed. This package can be found on Genesys AppFoundry and is also available on the Salesforce AppExchange.

To verify and enable the required settings in Salesforce:

1. Go to the setup screen in Salesforce and search for **Omni-Channel Settings**. Ensure that the **Enable Omni-Channel** checkbox is selected.
2. Next, search for **Partner Telephony Setup**. Make sure the **Turn on Voice with Partner Telephony** checkbox is selected.

Let me provide a clear and detailed setup guide for Salesforce.

Setup Required on Salesforce

The following core components must be configured in Salesforce: 1. Service Channel 2. Presence Status 3. Routing Configuration 4. Queue

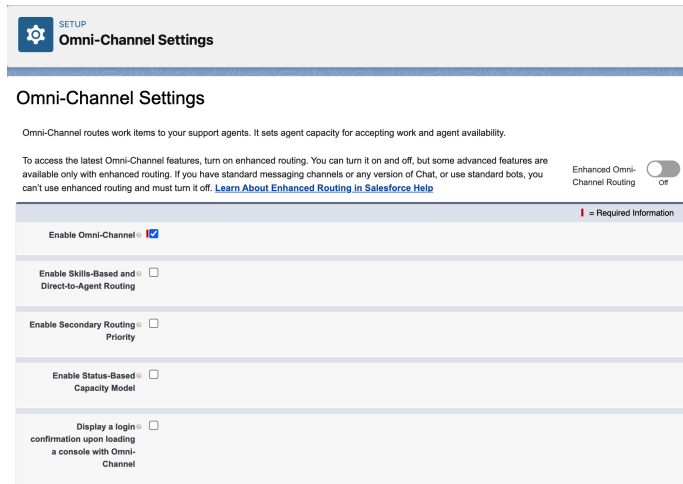


Figure 1: Enable Omni-Channel

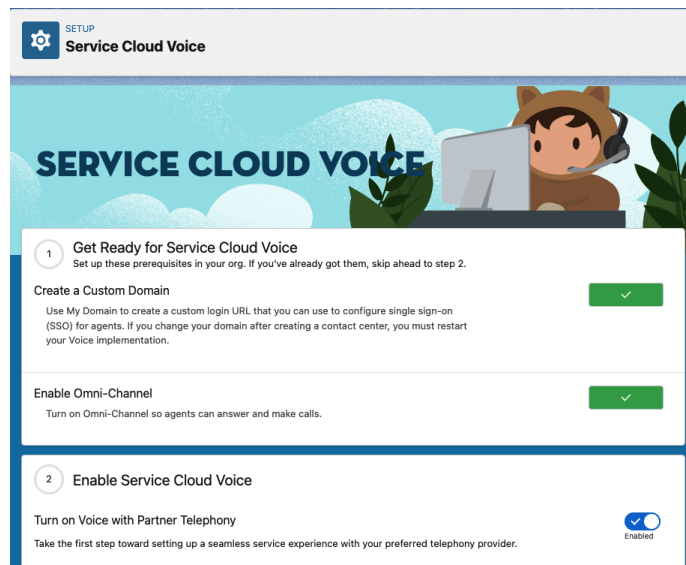


Figure 2: Enable Partner Telephony

1. Service Channel Setup

Follow these steps to create a service channel:

1. **Navigate to Service Channel:**
 - Go to Salesforce Setup
 - Search for “Service Channel” in Quick Find box
 - Click “Service Channel”
2. **Create New Service Channel:**
 - Click “New”
 - Fill in these fields:
 - Developer Name: A unique API name
 - Channel Name: User-friendly name
 - Channel Type: Choose “Messaging” or “Cases”
 - Click “Save”

2. Presence Status Configuration

1. **Create Presence Status:**
 - Go to Setup > Presence Status
 - Click “New”
 - Enter Status Name (e.g., “Available for Messaging”)
 - Enable it for the service channel
 - Click “Save”
2. **Assign to Profiles:**
 - Go to Setup > Profiles
 - Select the relevant agent profile
 - Under “Enabled Presence Status Access”
 - Add your new presence status
 - Save changes

3. Routing Configuration

1. **Access Routing Setup:**
 - Go to Setup
 - Search for “Routing Configurations”
 - Click “Routing Configurations”
2. **Create Configuration:**
 - Click “New”
 - Configure these required fields:
 - Name: “ExternalRouting”
 - Developer Name: “ExternalRouting”
 - Routing Model: External Routing
 - Click “Save”

4. Queue Configuration

1. Create Queue:

- Go to Setup > Queues
- Click “New”
- Fill in:
 - Label: Choose descriptive name
 - Queue Name: Auto-populated
 - Email: For notifications
- Select “ExternalRouting” as routing configuration
- Choose supported objects (MessagingSessions, Cases)
- Add queue members (users/roles)

Setup Required on Genesys Cloud

1. Create OAuth Client

1. Navigate to OAuth Settings:

- Go to Admin > OAuth
- Click “Add Client”

2. Configure OAuth Client:

- Name: “Salesforce External Routing”
- Grant Type: Select “Client Credentials”
- Description: Add a meaningful description

3. Add Required Permissions:

```
conversation:communication:blindTransfer
conversation:communication:blindTransferAgent
conversation:communication:blindTransferQueue
conversation:communication:disconnect
conversation:communication:transfer
conversation:communication:view
conversation:message:create
conversation:message:receive
conversation:message:view
messaging:integration:view
routing:queue:search
routing:queue:view
```

4. Save Client Details:

- Note down the Client ID and Secret
- These will be needed for Salesforce configuration

2. Create Open Messaging Integration

1. Access Message Platform:

- Go to Admin > Message > Platforms
- Click “Create Platform”

2. Configure Platform:

- Name: Enter descriptive name
- Type: Select “Open”
- Click “Save”

3. Create Integration:

- Go to Admin > Message > Integrations
- Click “Create Integration”
- Fill in required fields:
 - Name: Meaningful name
 - Platform: Select platform created above
 - Outbound Notification Webhook URL: Enter placeholder (e.g., “https://example.com”)
 - Outbound Notification Webhook Signature Secret Token: Enter placeholder value
- Click “Save”

3. Create Inbound Message Flow

1. Access Architect:

- Go to Admin > Architect
- Select “Inbound Message Flow”
- Create new or edit existing flow

4. Configure Messaging Routing

1. Setup Message Routing:

- Navigate to Admin > Message Routing
- Click “Add Route”
- Select the messaging integration
- Choose routing flow (create if needed)
- Save configuration

Important Notes

- Webhook URL and secret token are required but not used for external routing

Configure the Genesys Integration Details in Salesforce

Accessing the Integration

1. Access via Lightning Tab:
 - Click on the App Launcher (9 dots) in Salesforce
 - Search for “GC External Routing Integration”
 - By default, System Administrators have access to this functionality

Setup the integration

The interface consists of three key sections that are essential for setting up the Genesys Cloud External Routing integration with Salesforce Service Cloud:

1. **Get Started (Documentation)**
 - Provides initial setup information and essential documentation
 - Explains how the External Routing integration works
 - Details the seamless integration between Salesforce objects and Genesys Cloud’s robust Automatic Call Distribution (ACD)
2. **Configure Genesys Cloud OAuth Settings**
 - Managing OAuth authentication:
 - Client Credentials setup (Required and editable)
 - Region selection for your Genesys Cloud instance
 - Important steps:
 - Configure the required credentials
 - Save your settings
 - Use the Validate button to verify your credentials are working correctly
3. **External Routing Settings**
 - Routing Options retrieval:
 - Click “Retrieve Options” to fetch:
 - * Available Genesys Cloud Queues
 - * Open Messaging integrations
 - Queue Mapping Configuration (Critical for Transfers):
 - Set a Default External Routing Queue
 - Create Queue Mappings to link:
 - * Salesforce Service Cloud queues
 - * Corresponding Genesys Cloud queues
 - These mappings are essential for ensuring transfers work correctly between the Salesforce and Genesys Cloud.

Genesys Cloud Implicit Grant Setup for Salesforce

Configuring Redirect URI To set up the Implicit Grant flow for Genesys Cloud integration with Salesforce, follow these steps:

1. Add your Salesforce redirect URI to the list of allowed redirect URIs in the Genesys Cloud OAuth configuration.

2. The redirect URI should follow this format:

```
https://xxxx.lightning.force.com/resource/genesysps__genesysAuthCallback_ExtRoute
```

Replace `xxxx` with the base name of your Salesforce org.

3. In the example above, the base name 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/resource/genesysps__genesysAuthC
```

Enabling Popup Authentication To use the popup authentication method:

1. Ensure that your browser settings allow popups for your Salesforce domain.
2. The authentication process will open a new window or tab for the Genesys Cloud login.
3. After successful authentication, the popup will close automatically, and the main Salesforce window will be updated with the authenticated session.
4. If popups are blocked, the authentication process may fail. In this case, you'll need to allow popups for the Salesforce domain in your browser settings.

Note: Popup authentication provides a smoother user experience and helps prevent issues with browser redirects and token storage. However, it requires that users have popups enabled for the Salesforce domain.

Troubleshooting

- If you encounter issues with authentication, ensure that the redirect URI is correctly configured in both Genesys Cloud and your Salesforce org.
- Check your browser's popup blocker settings if the authentication window doesn't appear.
- Clear your browser cache and cookies if you experience persistent authentication issues.

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. (In case no value is appearing, make sure you initiate “retrieve option” request in the external routing configuration and Open messaging integration is created in your GC org)

- **Work_Item_ID__c**: Assign the `recordId` variable to this field, which corresponds to the Service Channel object.
- **ParticipantData_Attributes**: Optionally, include participant data attributes while creating the interaction with Genesys cloud and the values in the format `Attribute1=Value1, Attribute2=Value2`. When referencing Salesforce objects, use the format `Attribute={!Object.Value}`. Example - `priority={!Case.Priority}, status={!Case.Status}`

Figure 3: 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.

Here's a new section on transferring a workitem using external routing:

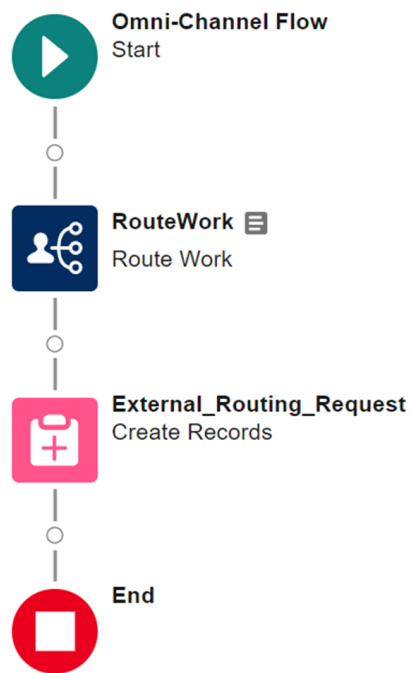


Figure 4: OmniChannel Flow

Transfer a Workitem

To transfer a workitem to another queue using external routing, follow these steps:

- 1. External Routing Settings:**
 - In the External Routing settings, click on “Retrieve Options” to fetch the available Genesys Cloud queues.
 - Map the Salesforce Service Cloud queues to the corresponding Genesys Cloud queues.
 - Set a default external routing queue. If no specific queue is mapped, the workitem will be routed to this default queue.
- 2. External Routing Request:**
 - The `External_Routing_Request` object has a field called `isTransfer`.
 - When creating a new `External_Routing_Request` record, set the `isTransfer` field to `true` to indicate that the workitem should be transferred to another queue.
- 3. Omni-Channel Flow for Transfer:**
 - Create an Omni-Channel Flow that triggers when the owner of a workitem is updated.
 - In this flow, create a new `External_Routing_Request` record with the `isTransfer` field set to `true`.
 - This will initiate the transfer of the interaction to the specified queue in Genesys Cloud.
- 4. Creating a New Interaction:**
 - If the requirement is to create a new interaction instead of transferring the existing one, set the `isTransfer` field to `false` when creating the `External_Routing_Request` record.
 - This will create a new interaction in Genesys Cloud rather than transferring the existing one.

By following these steps and configuring the External Routing settings, you can easily transfer workitems between queues or create new interactions as needed.

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:**

Create Records
×

*** Label**

*** API Name** ⓘ

Description

*** How to set record field values**

Manually

Create a Record of This Object

*** Object**

Set Field Values for the ExternalRoutingRequest

Field	Value
<div style="display: flex; align-items: center;"> ☰ Open_Messaging_Integration × </div>	<div style="display: flex; align-items: center;"> <input style="width: 80%;" type="text" value="SF ER Test"/> Q 🗑 </div>
<div style="display: flex; align-items: center;"> A ParticipantData_Attributes × </div>	<div style="display: flex; align-items: center;"> <input style="width: 80%;" type="text" value="key=value,color=blue,size=small"/> Q 🗑 </div>
<div style="display: flex; align-items: center;"> A Work_Item_ID × </div>	<div style="display: flex; align-items: center;"> <input style="width: 80%;" type="text" value="recordId"/> Q 🗑 </div>
<div style="display: flex; align-items: center;"> ☑ Is Transfer Workitem × </div>	<div style="display: flex; align-items: center;"> <input style="width: 80%;" type="text" value="True"/> Q 🗑 </div>

Manually assign variables

Check for Matching Records

Disabled

Figure 5: Transfer

- 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.

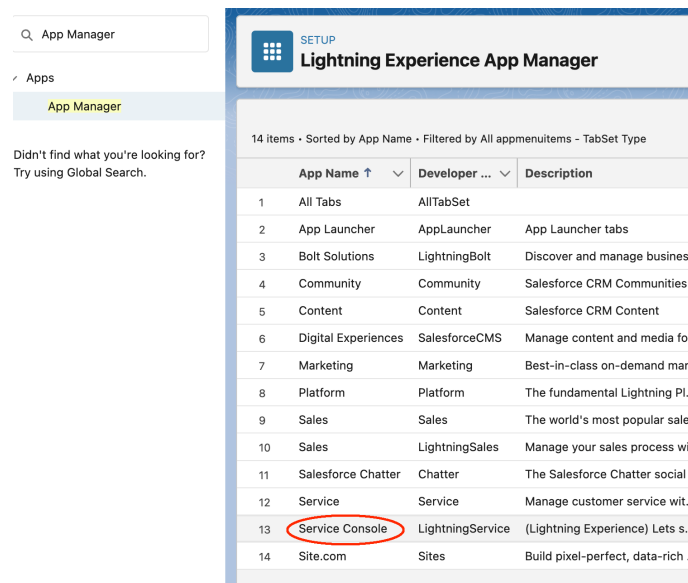


Figure 6: List Applications

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.

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.

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 7: Add Utility Item

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.x**
 - 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](#)