OneView for Salesforce

Administrator Guide

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CX Optimized

Contents

1 Getting started

OneView utilizes the Genesys Cloud Embeddable Framework integration to enable your Genesys Cloud org to be accessible in Salesforce.

Note: Running multiple versions of the Genesys Cloud embedded client side by side is not advisable and may result in unusual behavior. See https://help.mypurecloud.com/articles/about-genesys-cloud-embeddable-framework/.

1.1 Supported functionality

OneView for Salesforce uses Genesys Cloud feature configuration and makes it available to agents. These features must be configured in Genesys Cloud to be available through the OneView integration in Salesforce.

Note: Some features are not available to Genesys Cloud Communicate users.

Single sign-on (SSO) integration

OneView supports Genesys Cloud single sign-on for third-party entity providers. This is configured in the Salesforce Call Center settings for OneView. See *Import and edit call center settings*.

See https://help.mypurecloud.com/articles/about-single-sign-on-sso/.

Send Response action (Architect flow)

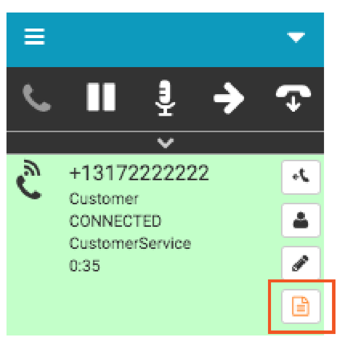
OneView supports the Send Response action for inbound chat and message flows.

See https://help.mypurecloud.com/articles/send-response-action/.

Outbound campaigns

OneView supports outbound campaigns from Genesys Cloud.

- Associated agent scripts are accessed via the script icon in the CTI panel.



- Salesforce flows can be triggered from an outbound campaign calling list on a per contact basis. See *Trigger flows via outbound calling lists*.

Auto answer

Auto answer configuration from Genesys Cloud is supported in OneView.

Note: Currently Genesys Cloud provides auto answer for voice calls only.

See https://help.mypurecloud.com/articles/turn-on-auto-answer-for-agents/.

Directory contacts

The OneView directory displays queues, users, and external contacts configured in your Genesys Cloud environment.

- **Queues**: See https://help.mypurecloud.com/articles/create-queues/.
- **External contacts**: See https://help.mypurecloud.com/articles/about-external-contacts/.

Click-to-dial

In OneView, when a click-to-dial number is clicked on a call, the participant data is added. For additional information, see *Click-to-dial data*.

See https://help.mypurecloud.com/articles/configure-click-to-dial/.

Canned responses

Canned responses configured in Genesys Cloud are used in OneView.

See https://help.mypurecloud.com/articles/canned-responses-overview/.

Note: Not available for Genesys Cloud *Communicate* users.

After interaction work

OneView pulls Genesys Cloud after interaction work settings from the queue configuration. See https://help.mypurecloud.com/articles/create-queue/.

- **Wrap-up timer (voice)**: The ACW wrap-up countdown timer presence in OneView is determined by the configuration of the Genesys Cloud queue settings, specifically time-boxed after-call work.

  See https://help.mypurecloud.com/articles/configure-call-work-settings/.

- **Wrap-up codes**: Wrap-up codes presented to agents in OneView are dependent on the codes configured for the queue the interaction has routed through.

  See https://help.mypurecloud.com/articles/wrap-codes/.

1.2 Browser requirements

OneView runs within the Salesforce browser and does not require additional software installed on a local machine. The following latest stable browser versions are supported:

- Google Chrome
- Mozilla Firefox
- Microsoft Edge Chromium

Notes:

- The browser vendor defines “latest” for their own browser. Check with your browser vendor to determine the latest version available.
- OneView does not support running concurrently in multiple browser windows or Salesforce tabs.

1.3 Navigation

OneView supports Console Navigation in Salesforce. See https://help.-salesforce.com/s/articleView?id=sf.console2_tabs_navigation.htm&type=5

Note: Standard navigation may be used but this limits the scope and features of OneView. See *Salesforce softphone layout integration* for Standard App Screen pops configuration.

1.4 OneView URL to allow

To avoid firewall barriers, add the OneView URL to the network allowlist:

```
https://oneview.avtexcloud.com
```

1.5 Language settings

In addition to native English, OneView supports the following languages for agents:

- French
- German

Displayed language is determined by the individual user's *preferred language* in Salesforce. See https://help.salesforce.com/s/articleView?id=000325737.

Notes:

- Translations within Salesforce tabs and pages are derived from Salesforce.
- Translations within the CTI panel are derived from Genesys Cloud.

1.6 Verify Salesforce admin permissions

The user installing and configuring the Salesforce package must have appropriate administrator permissions. See https://help.salesforce.com/articleView?id=sf.distribution_installing_packages.htm.

1.7 Verify Genesys Cloud admin permissions

Before proceeding with the installation of the OneView integration application, verify the Genesys Cloud user performing the install has the *admin role* or a role with the following permissions:

- authorization > role > All Permissions
- authorization > division > All Permissions
- oauth > client > All Permissions

If the user permissions need to be edited, have an administrator alter the user's permissions. See https://help.mypurecloud.com/articles/check-a-users-permissions/.

1.8 Verify Genesys Cloud agent permissions

The following Genesys Cloud permissions are required for agents.

Permissions may be assigned individually or a custom role containing all required permissions may be created. See Genesys Cloud, see https://help.mypurecloud.com/articles/add-roles/.

Permission	Purpose
Conversation > Call	Ability to handle calls.
Conversation > Conference	Ability to handle conferences.
Conversation > Callback > Create	Ability to add and schedule callbacks.
Conversation > Email >Accept	Ability to accept an email.
Conversation > Message > Accept	Ability to accept a message.
Conversation > Web Chat > accept	Ability to accept a web chat.
ExternalContacts > Contact > View	Ability to see contacts in directory / phonebook searches.
Outbound > Contact >Edit	Ability to edit contact.
Outbound > Contact >View	Ability to see the outbound contacts.
Outbound > DNC >Add	Ability to add DNC.
Recording > Recording > View	Ability to view past chat conversations.
Responses > Library > View	Ability to view canned responses.
Routing > Queue > Onqueue	Ability to set status to “On Queue” and receive inbound calls. **Note:** Not applicable for *Communicate* users.
Routing > Queue > Search	Ability to see queues in directory / phonebook searches.
Routing > Queue > View	
Routing > Wrap-up Code >View	Ability to view wrap up codes.

2 Install OneView

2.1 Install OneView in Genesys Cloud

This section guides you through installing the OneView for Salesforce integration and the application package in Genesys Cloud.

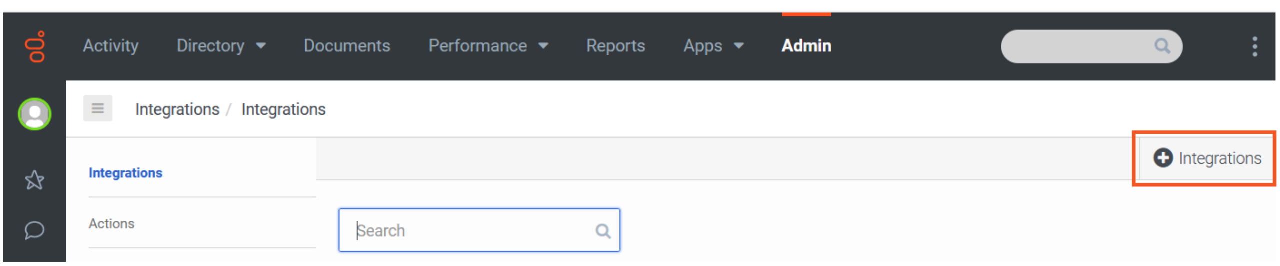
During installation of OneView, you select the roles in your Genesys Cloud organization you want to have licensed for OneView and the Oauth client application is configured.

Object	Name	Purpose
Permission	integration>oneView>agent	• Provides permission for the administrator to install the OneView for Salesforce integration • Assigned to the user roles for licensing.
OAuth client	Avtex_OneView_Oauth	• Provides the client credential grant to communicate with Salesforce Omni-Channel and provides synchronization • The Client ID and Secret of this OAuth client is used in the configuration of OneView in Salesforce.
Role	Avtex_OneView_Role	• Provides the required permissions to the OAuth client.

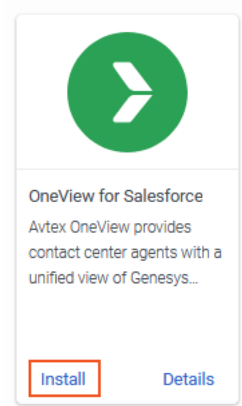
2.1.1 Add integration permission

The OneView integration provides the access and permission to install OneView.

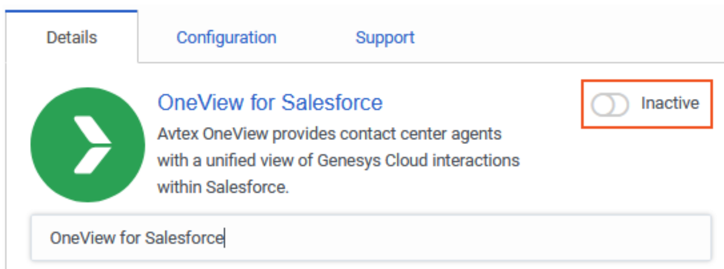
1. Sign in to Genesys Cloud, click the Admin menu.
2. In the Integrations section, click **Integrations**.
3. Click **+Integrations** in the upper right corner.



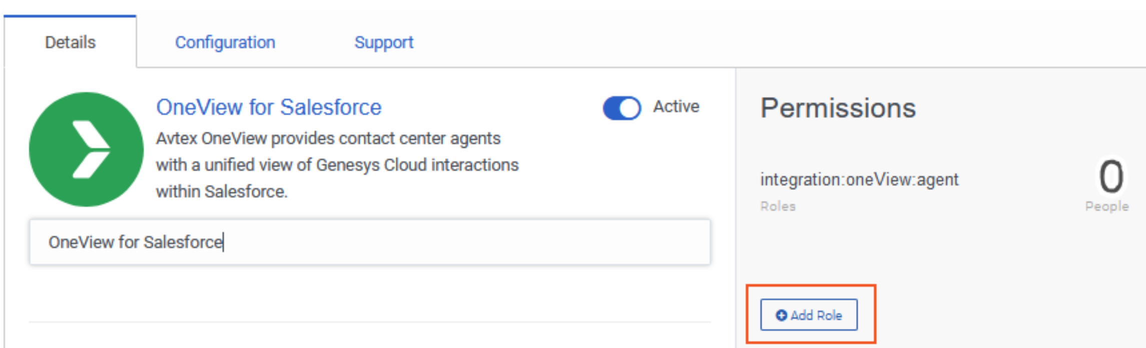
4. Locate the OneView for Salesforce card. Click Install. You are presented with the Third-Party App Terms of Service.



5. Change the application status to **Active** using the toggle.

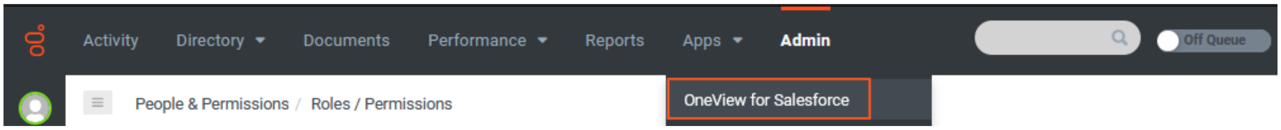


6. Once the application has been activated, click **Save**.
7. In the Permissions section that appears to the right, the *integration>oneView>agent* permission is presented. This permission needs to be assigned to yourself to proceed with the installation. Click **Add Role**.



8. Select **Create a New Role**. Enter a name unique to this integration, e.g., *OneViewAppAdmin*, and a description for the role. Click **Save**.
9. Once created, click the role link to add people. You must add yourself to this new role.
10. Click **Change Membership**. Select your name to have this new role applied and click **Save**.

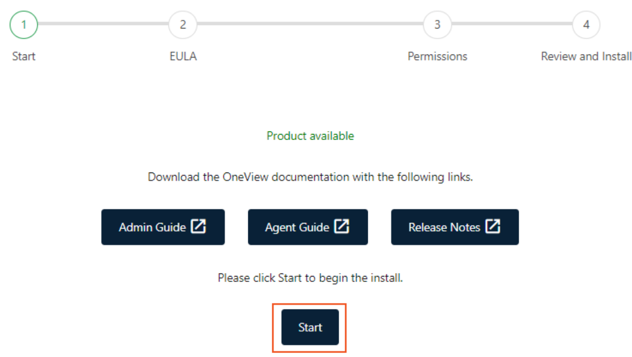
11. Refresh your browser and verify OneView for Salesforce is available in the Apps drop-down menu.



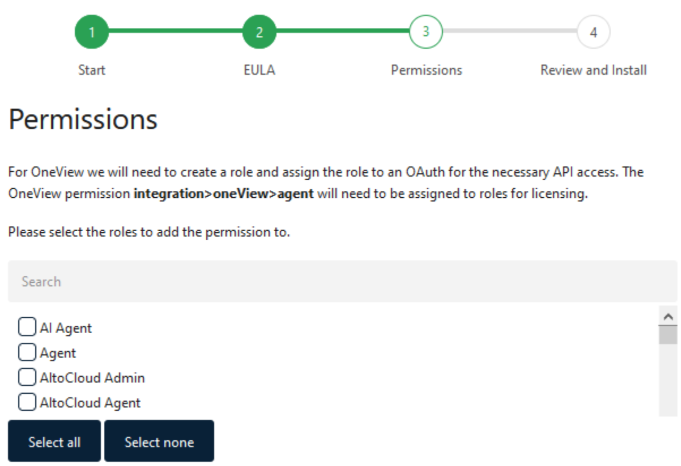
2.1.2 Install OneView for Salesforce integration

Accessing OneView for Salesforce in the Apps menu begins the installation process.

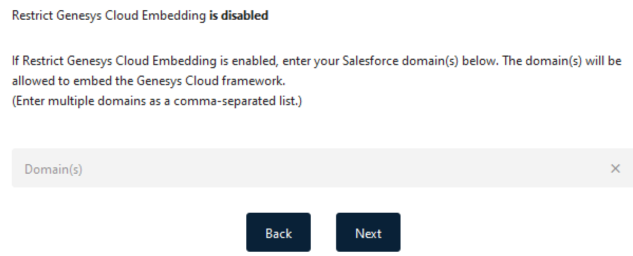
1. Click **Apps** and select OneView for Salesforce.
2. Click **Start** to begin the installation.



3. Review the End User License Agreement. Upon reviewing, click the acknowledgment checkbox to proceed.
4. Click **Next**.
5. On the Permissions page:
   a. Select the agent roles to be licensed for using OneView. The *integration>oneView>agent* is assigned to these roles.



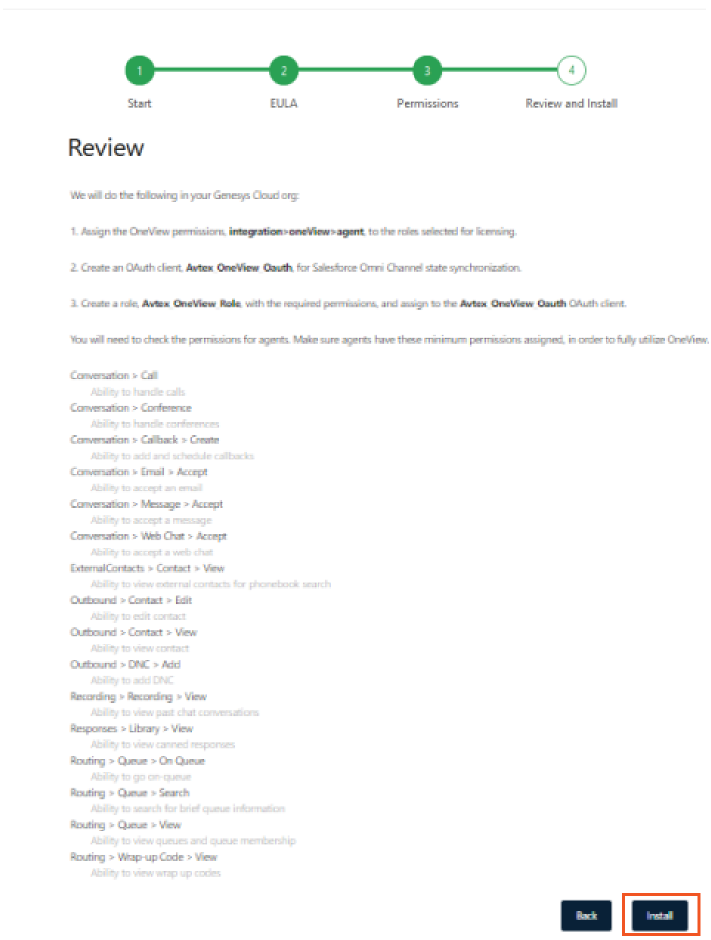
b. The installation provides the status of **Genesys Cloud Embedding** in your Genesys Cloud org. **If it is enabled**, enter your Salesforce domain(s) to allow them to embed the Genesys Cloud framework. (If it is disabled, the field is locked and no entry is required.)



Note: For information about Genesys Cloud Embedding, see https://help.mypurecloud.com/articles/manage-genesys-cloud-embedding/.

c. Click **Next**.

6. Verify you are ready to proceed with the installation and the permission changes as presented. Click **Install**.



7. Upon completion you are notified of the successful install. Click **Continue**. You are presented the Salesforce package links for production and sandbox environments and a Call Center template file.
8. Click the Call Center template button to download the `OneViewCallCenter.xml` file and save for use in the Salesforce configuration.

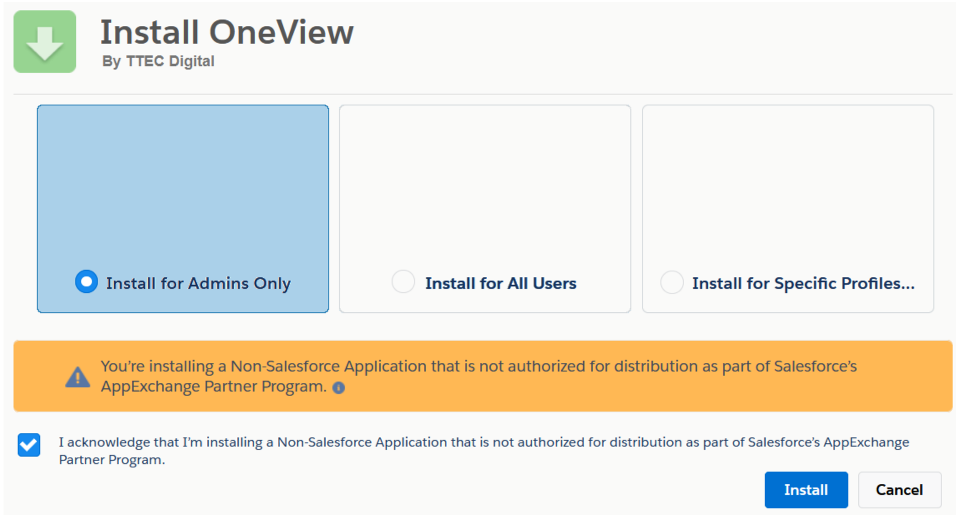
2.2 Install Salesforce managed package

The Salesforce installation provides the OneView framework to connect with Genesys Cloud.

To install the OneView package in Salesforce, follow the steps below:

1. In Genesys Cloud, click the Salesforce package link provided on the OneView confirmation page - production and sandbox links are available. If required, go to Apps > OneView for Salesforce to display the confirmation page again.
2. Select **Install for Admins Only** (recommended) and the acknowledgment statement to approve the install.

   Important: If Install for All Users is selected, agent access to custom objects and Visualforce pages must be manually edited. See *Add users to permission sets*



Note: OneView is not publicly available on Salesforce's AppExchange.

3. Click **Install**.
4. Approve Third-Party access for Genesys Cloud to Salesforce.

   Note: This access allows OneView to make requests to the Genesys Cloud Platform API for the appropriate region and retrieve agent presence statuses. The permitted Genesys Cloud Platform API regions may be edited after installation. See *Edit permitted Genesys Cloud platform regions (optional)*.
5. When installation is complete, click **Done**.

   Note: If a *CORS policy error* is encountered, sign out and then back in to Salesforce.

To create a custom role for agent assignment, see *Verify Genesys Cloud agent permissions*.

For general information on installing for specific profiles, custom profiles, and cloning standard profiles, see https://help.salesforce.com/articleView?id=sf.distribution_installing_packages.htm.

3 Configure OneView

3.1 Add users to permission sets

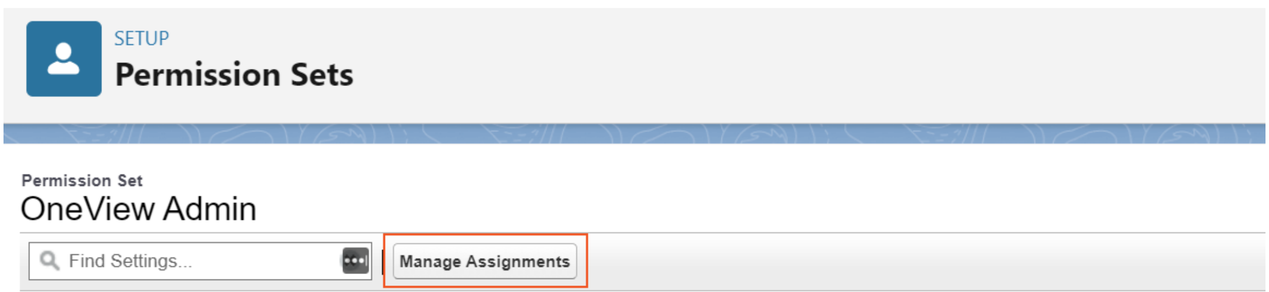
OneView has two permission sets for the users to be assigned according to their Salesforce user profile.

- OneView Admin
- OneView Agent

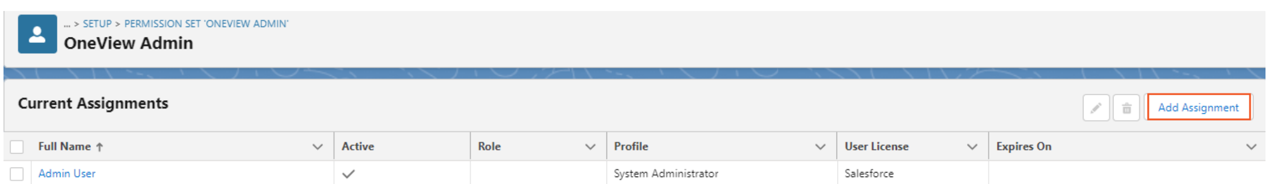
See *OneView permission set detail*

Follow the steps below to assign a user to the permission set:

1. From Setup using the Quick Find box, search for and select **Permission sets**.
2. Select **OneView Admin** or **OneView Agent** from the Permission Set Label to edit.
3. Click **Manage Assignments**.



4. To add users to the permission set, click **Add Assignments**.

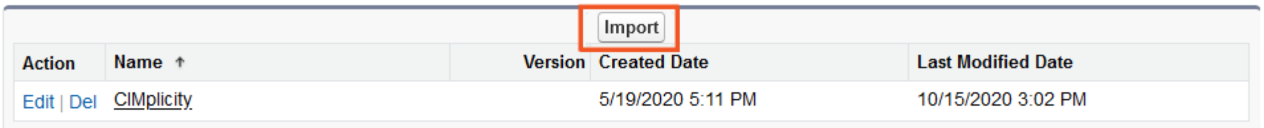


5. Select the user(s) you want to add and click **Next**.
6. Click **Assign**.
7. Verify assignments and click **Done**.

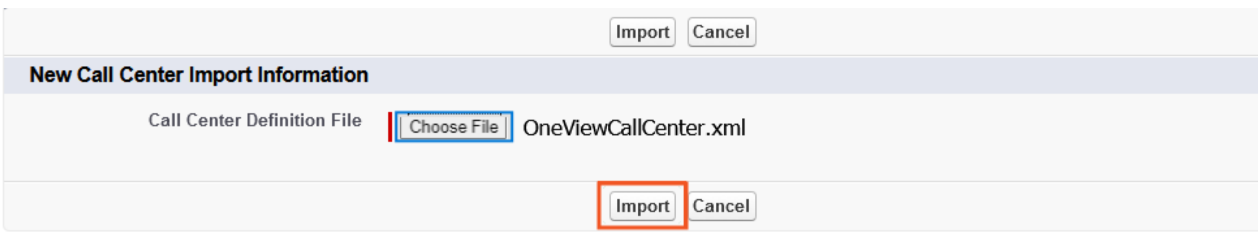
Result: The user is added to the permission set.

3.2 Import and edit call center settings

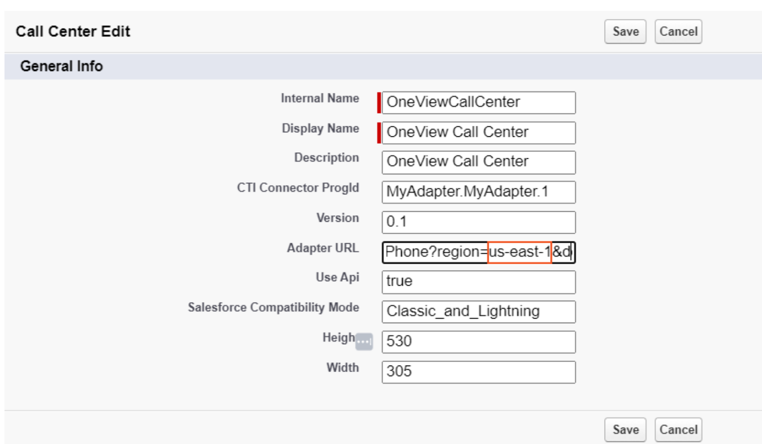
1. In Salesforce, from setup using the Quick Find box, search for and select **Call Centers**.
2. Click **Import**.



3. Click **Choose File** and locate the `OneViewCallCenter.xml` file.
4. Click **Import**.



5. Click **Edit**.
6. In the **Adapter URL** field, the default region applied is us-east-1. If your Genesys Cloud org is in a different region, edit the region in the string accordingly:



Name	Region
US East (Virginia)	us-east-1
US West (Oregon)	us-west-2
Canada (Central)	ca-central-1
Europe (Ireland)	eu-west-1
Europe (London)	eu-west-2
Europe (Frankfurt)	eu-central-1

Name	Region
Asia Pacific (Tokyo)	ap-northeast-1
Asia Pacific (Seoul)	ap-northeast-2
Asia Pacific (Sydney)	ap-southeast-2

7. If your environment requires single sign-on (SSO) integration, the **Adapter URL** string provides a dedicated login window option. The default is `false`. To support most SSO implementations (e.g., Microsoft Azure), change to `true`.

   For example:

   ```
   /apex/oneview__Phone?region=us-east-1&dedicatedLoginWindow=true
   ```

   For additional information on Genesys Cloud and SSO, see https://help.mypurecloud.com/articles/about-single-sign-on-sso/.

   Note: To setup **Auto Redirect to SSO**, include the orgName and provider in the **Adapter URL** string.

   For example:

   ```
   /apex/oneview__Phone?region=us-east-1&provider=adfs&orgName=oneView
   ```

   For additional information on Auto Redirect to SSO, see https://help.mypurecloud.com/articles/configure-call-center-settings/

8. Click **Save**.
9. Click **Manage Call Center Users** > **Add More Users**.
10. Click **Find** to view all available users or search for specific users in the search tool. Select applicable users. All intended OneView users must be assigned to this Call Center.
11. Click **Add to Call Center**.

    Note: For more information on assigning users to a Call Center, see https://help.salesforce.com/articleView?id=cti_admin_manageagentsadd.htm.

3.3 Configure OneView settings

The settings page provides OneView the connection between your Salesforce org and your Genesys Cloud org, as well as state synchronization , Salesforce flow triggers, Task Logging and Outbound Campaigns.

Notes:

- Upon upgrading OneView package from 3.x version to 4.x version, OneView settings now has a new page layout. To remove the old page layout from navigation, see *Remove the old OneView settings page from Salesforce navigation*.

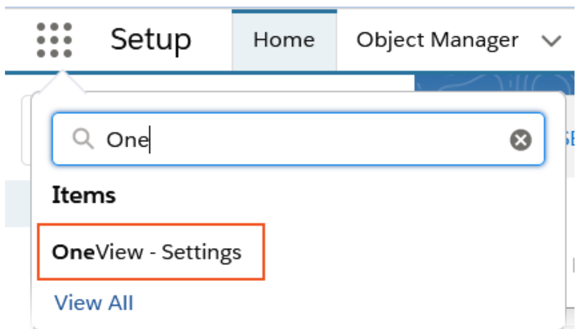
- State synchronization feature is only applicable for environment's using Omni-Channel. It track's an agent's ready and not ready status and synchronizes the states between Salesforce and Genesys Cloud. To implement this feature, Omni-Channel must be enabled and presence statuses configured in Salesforce.

  For information on Salesforce Omni-Channel, see:

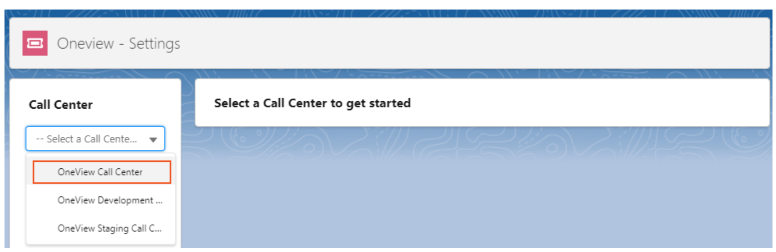
  - https://help.salesforce.com/articleView?id=sf.omnichannel_intro.htm
  - https://help.salesforce.com/articleView?id=sf.service_presence_create_presence_status.htm

For more information on Salesforce flows and triggers, see *Salesforce flow automation integration*.

1. Go to the App Launcher and locate **OneView - Settings**.



2. Select the **OneView Call Center** from the drop-down list.



3.3.1 Call Center

General Options

Agent Workspace Transfers

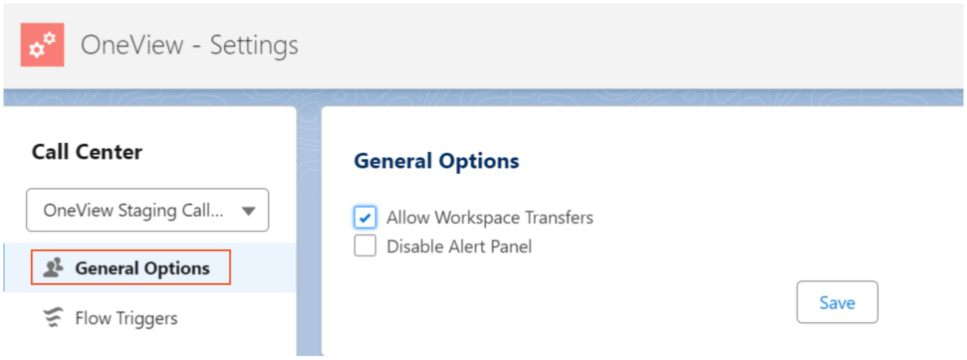
In the General Options section, admins have the Allow Workspace Transfer option to provide the transfer workspace ability for the agents. Based on the option enabled or disabled, agents will have the Transfer workspace option visible either in the CTI panel or in the embedded framework when a transfer is initiated.

Note: By default, Allow Workspace Transfer is enabled.

Disable Alert Panel

Admins can determine how the incoming interactions appear. When the option is not selected, the incoming interactions appear via the OneView alert panel else the incoming interactions utilizes the default Embedded Framework interface provided by Genesys.

Note: By default, Disable Alert Panel checkbox is not selected.



Flow Triggers

Important: Salesforce flows may be triggered in different ways. See *Triggering flows* for alternative methods. Configuring more than one method may create conflicts and/or duplications. This section should be left blank if triggering flows from participant data or outbound calling lists.

1. In the **Flow Triggers** section, map the triggers to your Salesforce flows using the drop-down menu for each flow type.

Flow trigger	Description
Alerting Flow	Flow to be triggered when a inbound conversation is alerted.
Connected Flow	Flow to be triggered when a inbound conversation is connected.
Disconnected Flow	Flow to be triggered when an conversation is disconnected.
Completed Flow	Flow to be triggered when ACW is completed on an conversation. **Note:** Only applies to conversations with an ACW portion.

2. Click **Save Flow Triggers**.

Task Logging

Enable task logging to create task records for incoming interactions and define the object types available to agents on wrap up.

Important: When the task logging feature is enabled, it is recommended to not use flow triggers to create task records.

1. Select **Enable Task Logging**.
2. Select the **Who** objects to be available in the **Name** field of agent interactions.
3. Select the **What** objects to be available in the **Related To** field of agent interactions.

Task Field Mappings

Note: When mapping, the Genesys Cloud attribute data type must be validated with Salesforce Task field data type.

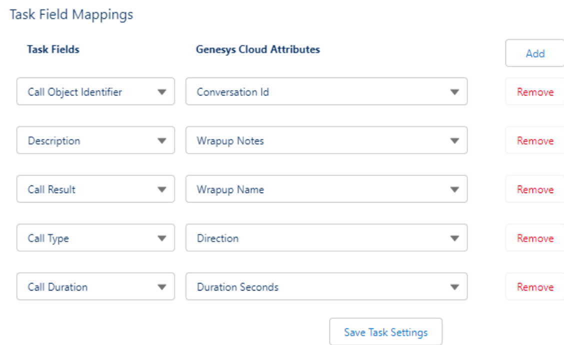
For example: Genesys Cloud attribute of type "String" is compatible with Salesforce Task field "text" but not necessarily a type of "DateTime".

Listed below are the fields that can be mapped onto fields of the task record.

Name	Type
Address	String
ANI	String
Callback User Name	String
Connected Time	DateTime
Conversation Id	String
Customer Callback Scheduled Time	DateTime
Direction	String
Disconnect Type	String
Disconnected Time	DateTime
Display Address	String
Display Name	String
DNIS	String
Duration Seconds	Integer
End Acw Time	DateTime
Media Type	String
Queue Id	String
Queue Name	String
Start Acw Time	DateTime
Subject	String
User Id	String
User Queue Id	String
Wrapup Code	String
Wrapup Duration Seconds	Integer
Wrapup End Time	DateTime
Wrapup Name	String
Wrapup Notes	String

The **Task Field Mappings** section, maps the Salesforce Task field from the Genesys Cloud properties using the drop-down menu for each type. The mapping occurs when an interaction is connected to the agent and on complete.

For example:



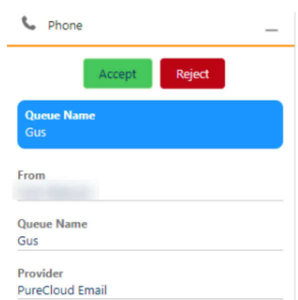
4. Click **Save Task Settings**.

Notes:

- When created taskid with the task logging, the task is saved under the key OneView_taskId. Pops the task when the conversation is completed.
- Agents must refresh their web browser to receive any changes made to these settings while they are signed in.

Interaction Details

In OneView settings page, Interaction details, there are labels describing each interaction including queue name, provider, and customer contact. These labels can be controlled by interaction type, the order the values are shown, and the attributes to be used.



Interaction Details tab contains sections for each interaction types.

Within each section:

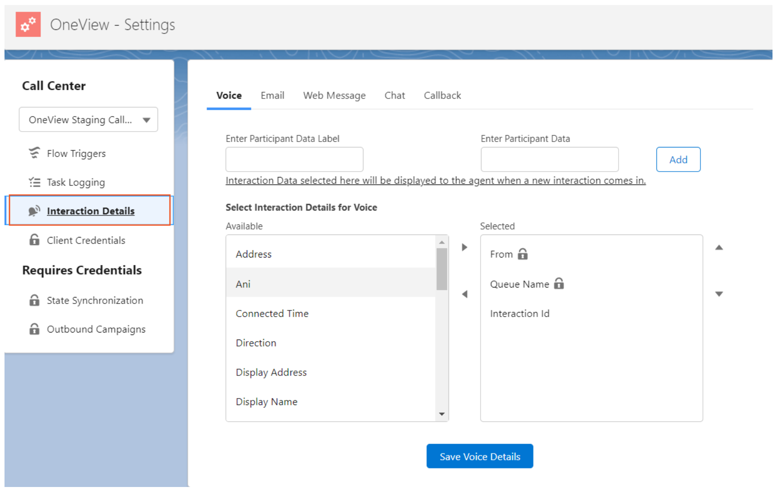
1. Select the attributes from the **Available** list.
2. Move the selected attributes to the **Selected** list. The selected attributes list drives which attributes will be used for the respective interaction type.
3. Click **Save Details**.

Result: Interaction details are saved and are displayed to the agent upon receiving an interaction.

Custom attributes can also be configured by applying participant data to the interaction:

1. **Participant Data Label**: Enter the label to be displayed as the subject when an interaction appears.

2. **Participant Data**: Enter the data associated with the Participant data label. The data can also be retrieved from Genesys Cloud conversations.
3. Click **Add** to display the attributes in the Selected list.
4. Click **Save Details**.



Note: Adding additional interaction details is not required. Using the default interaction details will show From, Queue name, and provider. The Agent will need to refresh the browser after the admin has made changes.

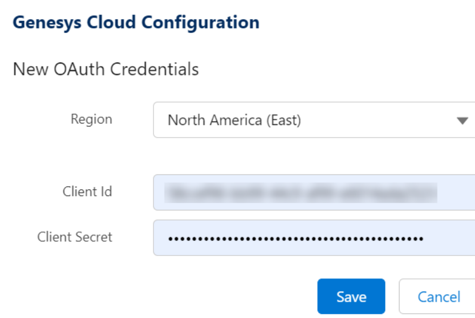
Client Credentials

Genesys Cloud Configuration

Important: Genesys Cloud Configuration is necessary only if Salesforce Omni-Channel is enabled or when intend to install the OneView Voice Outbound Campaign Synchronization add-on. If neither of these tools are used, configuring this setup is not required.

1. Select your **Genesys Cloud region**. This must match the region configured in the call center settings.
2. Return to your **Genesys Cloud browser window** and go to **Admin** > **OAuth**.
   a. Click **Avtex_OneView_OAuth** app.
   b. Copy the Client ID and Client Secret to the **OAuth Client Credentials** field in your OneView - Settings in Salesforce.

c. Click **Save Configuration**.



3.3.2 Requires Credentials

State Synchronization

Note: Client Credentials must be configured to access State Synchronization. See *Client Credentials*

1. If Omni-Channel is enabled, select **Enable State Synchronization** to configure the state mappings in the State Synchronization section.

Section	Description
Ready States	Select a default ready state for each system. When the agent is in the ‘On Queue’ state in Genesys Cloud, the agent is placed into the selected Omni-Channel state. *Not supported for Genesys Cloud Communicate users.*
Default Not-Ready States	Select a default not ready state for each system. These states are used whenever the agent transitions from a ready state to a not ready state. *Not supported for Genesys Cloud Communicate users.*
Interacting States	For each scenario, select a matching state in the alternate system. These states are used when the agent is handling an interaction.
Custom State Mappings	If required, add additional custom state mappings. These custom state mappings take priority over the Default Not-Ready States above.

2. Click **Save State Mappings**.

Outbound Campaign

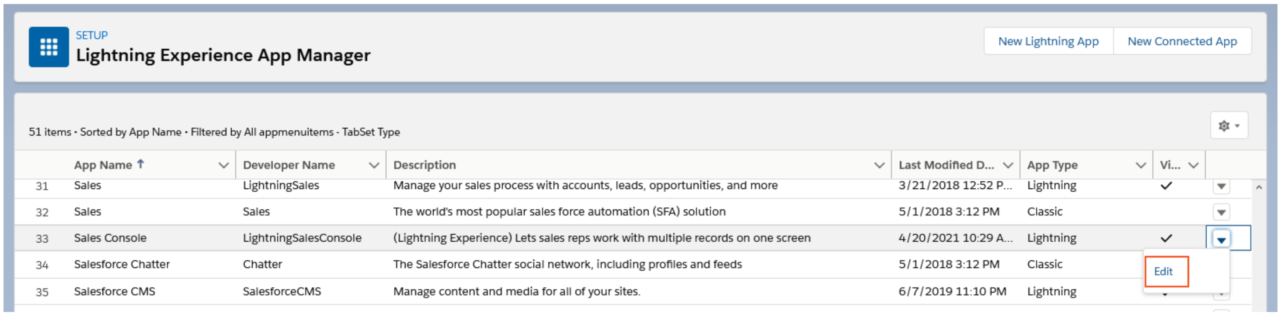
Outbound Campaigns feature on the OneView settings page will only be available if the campaign sync package is installed. For more information , see *Voice Outbound Campaign Synchronization*.

3.4 Add OneView to a Lightning app

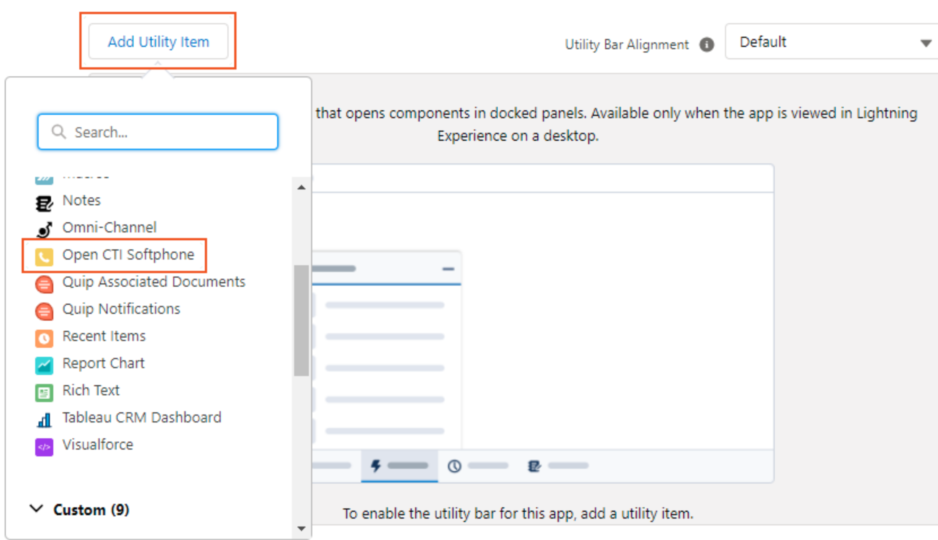
OneView functions via the **Open CTI Softphone** component in a Lightning app. An existing app in your organization can be edited or a new one created.

Note: Navigation style cannot be changed on an existing app. If the existing app is not set to console navigation, a new app needs to be created to set the navigation style appropriately. For detailed instructions on creating a new lightning app, see https://help.salesforce.com/articleView?id=sf.dev_apps_lightning_create.htm.

1. From Setup using the Quick Find box, search for and select **App Manager**.
2. Click **Edit** in the drop-down menu next to your app.

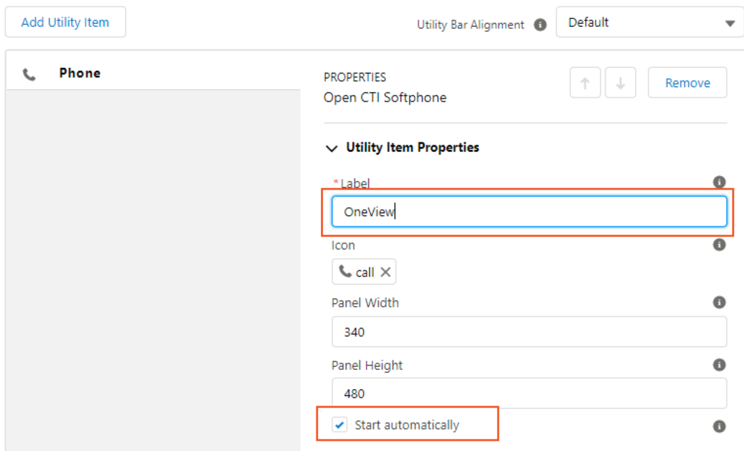


3. In App Options, confirm the following options are selected and click **Next**.
   a. **Navigation style**: Console navigation
   b. **Supported Form Factor**: Desktop
4. In Utility Items, click **Add Utility Item** and select **Open CTI Softphone**.



5. Set the Utility Item Properties as follows:
   a. **Label**: OneView, or preferred unique name.
   b. Enable **Start automatically**.

   Note: The panel width and height are not utilized. To control the size of the softphone, see *Import and edit call center settings*.



6. In Navigation Items, ensure the following items are selected:
   - Accounts
   - Cases
   - Contacts
   - Home
   - Leads
   - Opportunities
   - Tasks
7. Confirm or edit the Navigation Rules and User Profiles as needed.
8. Verify the new app is visible to users from the App Launcher.

   Note: Users must be a member of the OneView Call Center to see the softphone. See *Import and edit call center settings*.

3.5 Add OneView components to Lightning pages

OneView components can be added to App, Home, or Record pages. When embedded on all record pages, this ensures ease of access at all times to the OneView components.

There are three components to be added:

- **OneView - Embedded Controls**: provides OneView call controls.
- **OneView - Embedded Interaction**: provides interaction details.
- **OneView - Recordings**: provides chat and message transcripts.

Notes:

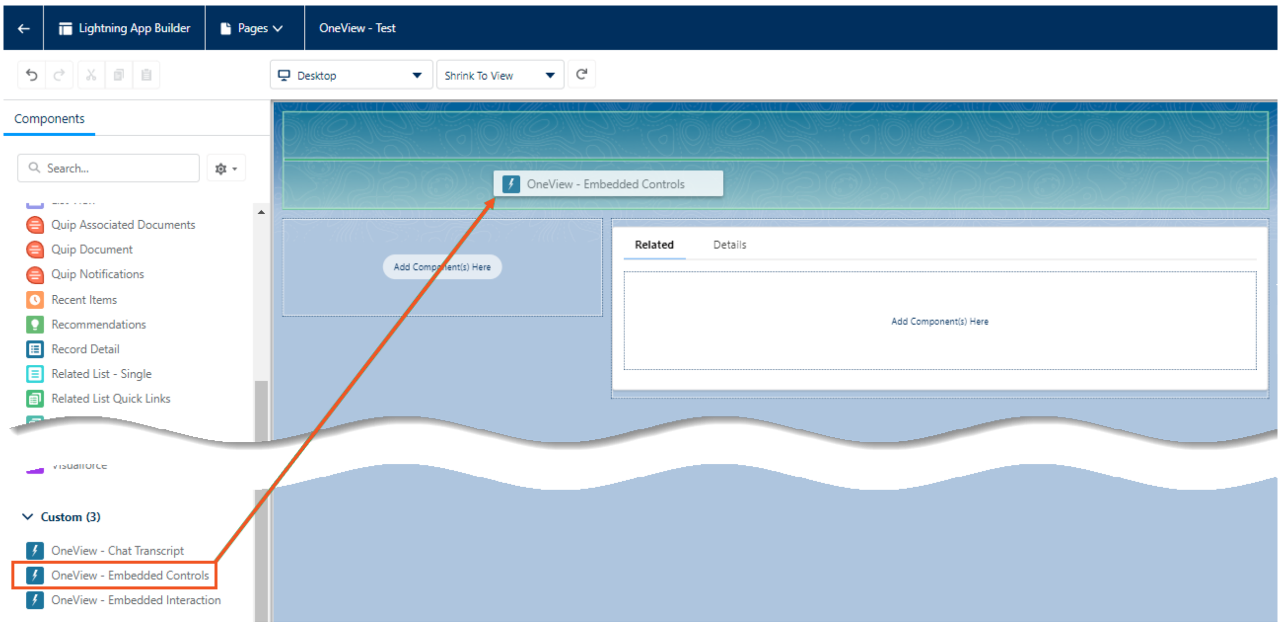
- Only available for Lightning Record pages.

- Suggested configuration: add to the record page that represents the interaction log details, e.g., Cases or Tasks.
- Audio recordings are not available currently.
- Chat transcripts are not available to Genesys Cloud *Communicate* users.

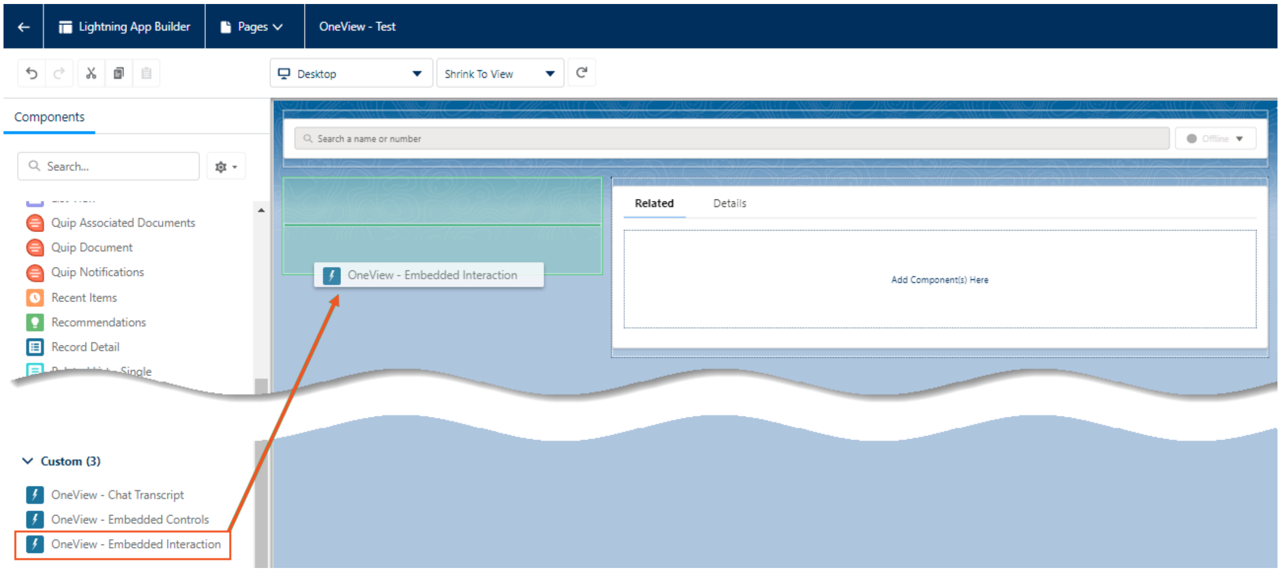
1. Open a page in the **Lightning App Builder**.

   Note: We recommend the "Header and Left Sidebar" page template. For help with existing or creating new Lightning pages, see https://help.salesforce.com/articleView?id=sf.lightning_page_overview.htm.

2. Locate the **OneView - Embedded Controls** component (in the Custom section) and drag it to the desired location on the page.

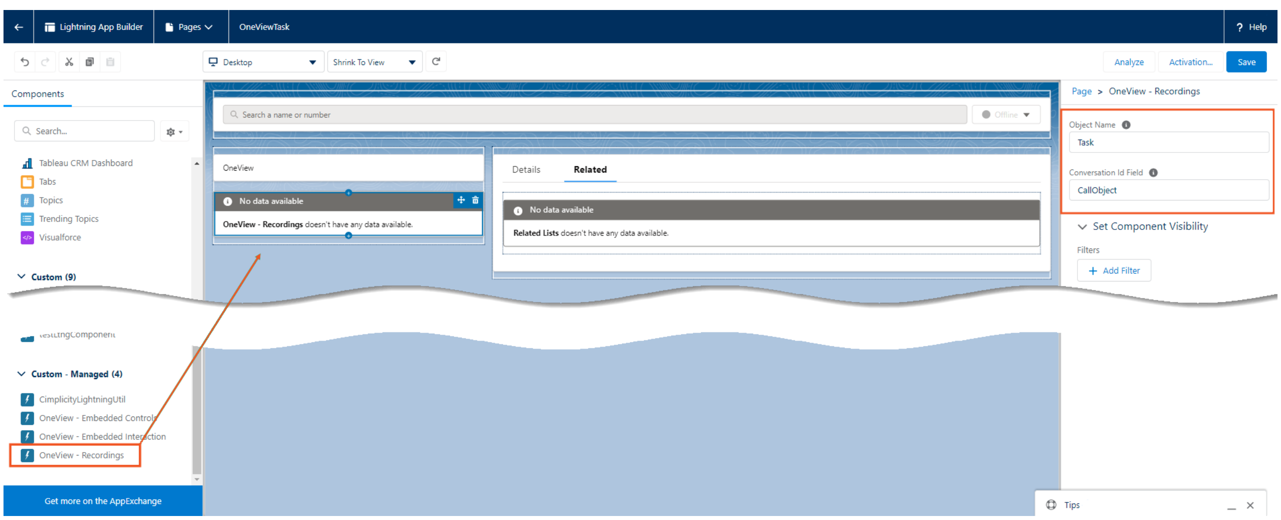


3. Locate the **OneView - Embedded Interaction** component (in the Custom section) and drag it to the desired location on the page.



4. Locate the **OneView - Recordings** component (in the Custom section) and drag it to within the OneView - Embedded Interaction component. Enter the parameters for the component displayed on the right:
   - **Object Name:** API name of the object this page is for. This defaults to the page type, i.e., "Task" if placing the component on a Task page, "Account" if placing on an Account page, etc.
   - **Conversation Id Field:** API name of the field that will contain the Genesys conversation Id. This defaults to *CallObject*.

   Note: Ensure the flow responsible for creating this record (Task, Account, etc) is inserting the conversation id into the field configured here.



5. Add, edit, or remove any other components to change the page's layout as desired.

6. Click **Save**.

   Note: Verify how the controls appear with other content on each page to ensure there is enough room. Drop-down and/or pop-up menu items within the embedded controls, such as the directory search, wrap-up code list, or the keypad, may be cutoff if the layout is not adjusted.

3.6 Salesforce softphone layout integration

A Salesforce softphone layout controls the call-related fields that are displayed and the Salesforce objects that are searched for on an incoming call. A Salesforce Softphone layout can be triggered through a Genesys Cloud Architect flow using a key:value pair to initiate a screen pop.

OneView provides the `oneView_screenpopTarget` key for use in a Genesys Cloud Architect flow to set participant data on an incoming interaction and search for the value in Salesforce on call connection. The resulting object of this search is presented (i.e., screen popped) to the user according to the Softphone Layout assigned to the agent profiles associated with the OneView Call Center. Screen pops triggered by the softphone layout are associated with the interaction that triggered them.

To review available interaction attributes, see https://help.mypurecloud.com/articles/architect-default-variables/.

Note: Screen pops can also be achieved using OneView custom actions. See *Salesforce flow automation integration*.

For more information, see:

- Genesys Cloud Architect: https://help.mypurecloud.com/articles/architect-overview/
- Salesforce Softphone Layout: https://help.salesforce.com/articleView?id=sf.cti_admin_phonelayouts.htm

Genesys Cloud

1. In Genesys Cloud, go to Admin > **Architect** and access your designated Inbound flow.
2. In a **Set Participant Data** block, add a `key:value` pair using the `oneView_screenpopTarget` key and a Genesys Cloud value, or data type, to search for in Salesforce.

   For example:

Note: The `Call.Ani` value in Genesys Cloud is returned as `tel:+14035551212`, which is not recognized by Salesforce. To resolve this, remove the leading characters from the phone number string with the value `Replace(Call.Ani, "tel:+, '')`.

3. Save the changes to the flow.

Salesforce

1. In Salesforce, from setup using the Quick Find box, search for and select **Softphone Layouts**.
2. Click **New** or **Edit** next to an existing layout definition.
3. Enter a name for your layout.
4. Select Call Type **Inbound**.
5. Configure the Softphone Layout and Screen Pop Settings as desired. See [https://help.-salesforce.com/articleView?id=sf.cti_admin_phonelayoutscreate.htm](https://help.salesforce.com/articleView?id=sf.cti_admin_phonelayoutscreate.htm).

6. Click **Save** to return to the Softphone Layouts listing.
7. Click **Softphone Layout Assignment**.
8. Add the layout to the appropriate profiles. See https://help.salesforce.com/articleView?id=sf.cti_admin_phonelayoutsassign.htm

   Note: Profiles are only listed in this page if they include users that are currently assigned to a call center, or if they have already been assigned a custom softphone layout.

9. Click **Save**.

4 Salesforce flow automation integration

OneView leverages Salesforce's Process Automation Flows. OneView custom actions are used along with existing Salesforce actions to design flows that automate a business process. This OneView integration allows you to use Genesys Cloud attributes and data to retrieve corresponding customer information from Salesforce.

Note: To ensure the successful execution of flows within the org, it's essential to enable the **Run Flows** permission for the Salesforce profiles. If this permission is not assigned for a particular profile, users assigned to that profile will encounter an error message "*Flow name has encountered an error and was unable to complete*" when trying to run flows.

To learn more about Salesforce Flows and how to use them, see:

- https://help.salesforce.com/articleView?id=sf.flow.htm
- https://help.salesforce.com/articleView?id=sf.flow_concepts_building_blocks.htm
- https://trailhead.salesforce.com/en/content/learn/trails/build-flows-with-flow-builder

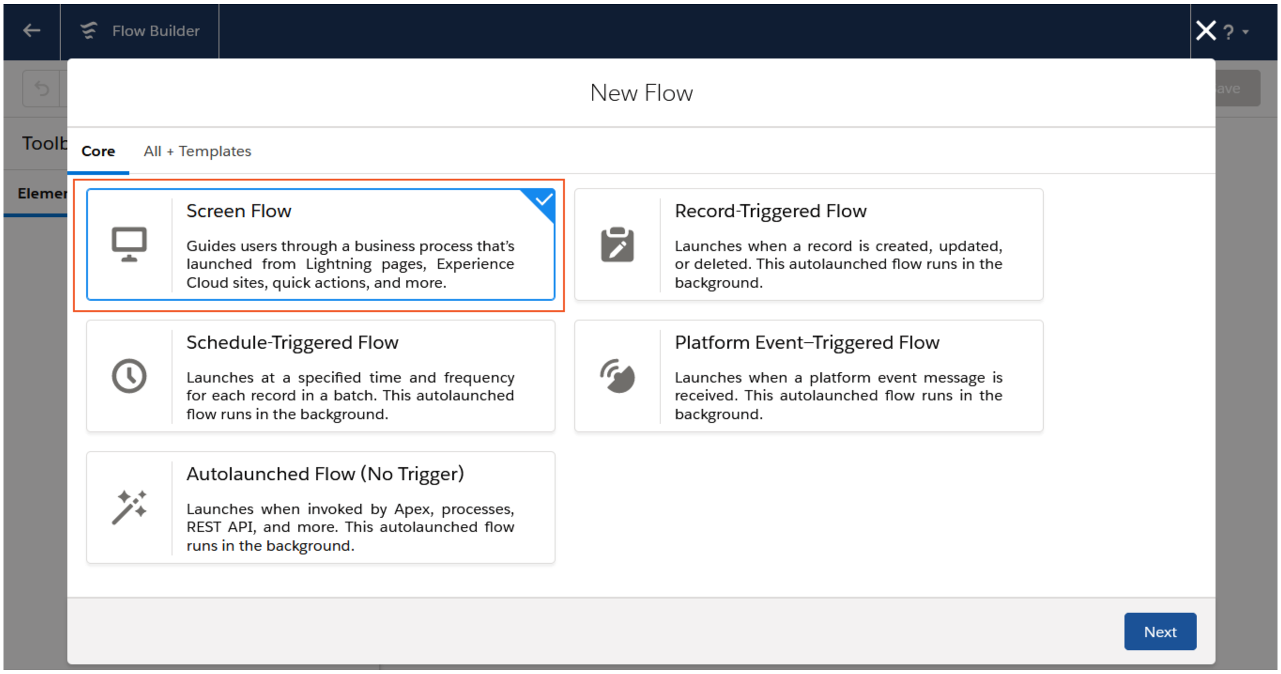
If your flows are ready for OneView, skip ahead to *Triggering flows*.

4.1 Creating flows

4.1.1 Flow prerequisites

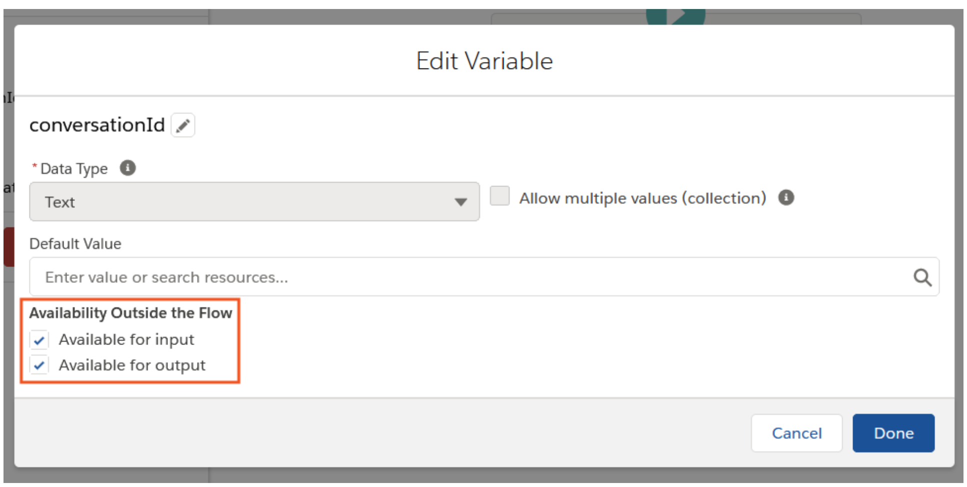
Salesforce Flows must have the following qualities to be triggered from OneView as part of the workflow automation:

1. The flow type must be **Screen Flow**.



Note: The flow element of "Screen" ***cannot*** be used in a flow triggered by OneView.

2. Each flow must have a variable with an input parameter for `conversationId` to retrieve the Genesys Cloud conversation ID. The variable must have **Available for input** enabled.



4.1.2 OneView custom actions

OneView custom actions are used along with existing Salesforce actions to design flows that automate a business process. These custom actions are supported when run in a Screen Flow triggered by OneView and/or a Lightning App Flow.

OneView provides eight custom actions:

Action Name	Description
OneView - Add Attribute Action	Sets data on the participant user of the conversation. See *Add a Genesys Cloud attribute*.
OneView - Get Attribute Action	Retrieves an attribute from the conversation data. See *Get a Genesys Cloud attribute*.
OneView - Get Contact List Attribute Action	Retrieves an attribute from the contact list data. See *Get a Genesys Cloud Contact List attribute*.
OneView - Get Conversation Action	Retrieves the associated attributes for a conversationId. See *Get a Genesys Cloud conversation*
OneView - Open Flow in Primary Tab Action	Pops a Salesforce Screen Flow as a primary tab. See *Open Flow in Primary Tab*.
OneView - Open Flow in Sub Tab Action	Pops a Salesforce Screen Flow as a sub tab for the agent. See *Open Flow in Sub Tab*.
OneView - Open Record in Primary Tab Action	Pops a record in a primary tab for the agent. See *Open Record In Primary Tab*.
OneView - Open Record in Sub Tab Action	Pops a record in a sub tab for the agent. See *Open Record In Sub Tab*.
OneView - Open URL in Primary Tab Action	Pops a URL in a primary tab for the agent. See *Open URL In Primary Tab*.
OneView - Open URL in Sub Tab Action	Pops a URL in a sub tab for the agent. See *Open URL in Sub Tab*.
OneView - Replace Current Tab Action	Replaces the tab running the flow with the specified URL. See *Replace current tab*.
OneView - Wait For Login Action	Checks if the user is logged in or not. See *Wait For Login Action*
OneView - Transfer Action	Performs a Blind transfer on an active conversation to a user, contact or queue. See *Transfer Action.*
OneView - Wrapup Action	Ends a conversation with wrapup code. See *Wrapup Action*
OneView - Disconnect Action	Disconnects an active conversation. See *Disconnect Action*.

Notes:

- Salesforce, and therefore OneView, cannot open the same record in multiple primary tabs. Popping a record unique to the interaction, such as a case or task, is a possible work around.
- When using the Debug feature to test a flow in Salesforce Flow Builder, OneView custom actions do not generate screen pops or create, read, or update Genesys Cloud conversation data. No data is returned during the debug.
- OneView custom actions cannot be embedded in Visualforce Pages; they must be running in the top-level frame.

For examples of custom actions, see *Example Salesforce Flows*.

Screen pops can also be achieved using *Salesforce softphone layout integration*.

Add a Genesys Cloud attribute

This uses OneView's custom action **OneView - Add Attribute**. This sets data on the participant user of the conversation. Each participant has their own set of data.

Applicable uses:

- In a Screen Flow triggered by OneView.
- In a Lightning App Flow.

Inputs

- Attribute name (required): The key/name of the attribute.
- Attribute value (required): The value of the attribute.
- Conversation Id (required): The Genesys Cloud conversation id of the call. The attribute will be added to this call.

Outputs

- Attribute value: The result from getting the attribute value from the call data will be stored here.

Get a Genesys Cloud attribute

Genesys Cloud attributes are accessed by the **OneView - Get Attribute** action. This retrieves an attribute (a key and value pair) from the Genesys Cloud call data for use in a Salesforce flow. This action searches all participants for the specified key. If the key is duplicated across multiple parties in a conversation, the key from the most recent party is used. Participants are added in the order that they join.

Applicable uses:

- In a Screen Flow triggered by OneView.
- In a Lightning App Flow.

Inputs

- Attribute name (required): The key/name of the attribute to get.
- Conversation Id (required): The Genesys Cloud conversation id of the call. The attribute will be retrieved from this call.

Outputs

- Attribute value: The result from getting the attribute value from the call data will be stored here.

Get a Genesys Cloud Contact List attribute

This uses OneView's custom action **OneView - Get Contact List Attribute**. Retrieves an attribute for the key/name from the Genesys Cloud contact list for use in a Salesforce flow.

Note: This custom action is applicable to outbound campaigns.

Applicable uses:

- In a Screen Flow triggered by OneView.
- In a Lightning App Flow.

Inputs

- Contact list data name (required): The key/name of the attribute to get.
- Conversation Id (required): The Genesys Cloud conversation id of the call. The attribute will be retrieved from this call.

Outputs

- Contact list data value: The result from getting the attribute value from the contact list data will be stored here.

Get a Genesys Cloud conversation

This uses OneView's custom action **OneView - Get Conversation**. This retrieves the associated Genesys Cloud attributes for a conversationId to be available in a Salesforce flow.

Applicable uses:

- In a Screen Flow triggered by OneView.
- In a Lightning App Flow.

Inputs

- Conversation Id (required): The Genesys Cloud conversation id of the call.

Outputs

Name	Type	Description
address	String	The address of the user participant.
afterCallWorkState	String	After call work state for the interaction. Valid values: unknown, notApplicable, skipped, pending, complete
ani	String	The ANI of the inbound voice call. I.e., the participant's phone number on the conversation.
attributes	String	The attributes from all the participants on the conversations. Value is a JSON formatted string.
callbackUserName	String	The name of a callback participant.
connectedTime	DateTime	The time stamp when the call was connected.
customerCallbackScheduledTime	DateTime	The time the callback was scheduled or queued.
direction	String	The direction of the call.Valid values: inbound, outbound.
displayAddress	String	The address or phone number of the other participant on the conversation.
disconnectedTime	DateTime	The time stamp when the call was disconnected.
disconnectType	String	System defined string indicating what caused the communication to disconnect. Valid values: endpoint, client, system, timeout, transfer, transfer.conference, transfer.consult, transfer.forward, transfer.noanswer, transfer.notavailable, transport.failure, error, peer, other, spam, uncallable.

Name	Type	Description
dnis	String	The DNIS of the inbound voice call. I.e., the original number the customer dialed to reach the contact center.
durationSeconds	Integer	The length of time in seconds.
endAcwTime	DateTime	The time stamp when the user ended after-call work.
externalContactId	String	The Genesys Cloud unique identifier for the external contact. See *Locating an Id to use in a flow*.
externalOrganizationId	String	The Genesys Cloud unique identifier for the external org.
held	Boolean	If the call is held.
interactionId	String	The Genesys Cloud unique identifier for the interaction on this conversation.
isConference	Boolean	Identifies if the inbound call is a consult/conference. [1]
isInternal	Boolean	Identifies if the inbound interaction is internal. [2]
isTransfer	Boolean	Identifies if the inbound interaction is a transfer. [3]
mediaType	String	Valid values: email, voice, callback, chat, message
messagesSent	Integer	0 if the agent didn't reply to the customer; 1 if the customer responded.
otherAddress	String	The address as close to the bits on the wire as possible.
otherName	String	Name data for a call endpoint. Can be an ani or internal contact name.
participantId	String	The unique identifier for the user participant on this conversation.
peerId	String	The id of the peer communication corresponding to a matching leg for this call.
provider	String	The source provider for the call.
queueId	String	The queue id of the acd participant. See *Locating an Id to use in a flow*.
queueName	String	The name of the acd participant.
recording	Boolean	If recording is on.
selfName	String	Address and name data for a user endpoint.
startAcwTime	DateTime	The time stamp when ACW was started.
state	String	The connection state of the call. Valid values: alerting, dialing, contacting, offering, connected, disconnected, terminated, converting, uploading, transmitting, none.
subject	String	The subject of the inbound email or of the outbound email if it was already sent.
userId	String	The unique identifier for the user. See *Locating an Id to use in a flow*.
userQueueId	String	The queue id that the call came in on for the user participant.
wrapupCode	String	The user configured wrap up code id. See *Locating an Id to use in a flow*.
wrapupDurationSeconds	Integer	The length of time in seconds that the agent spent doing after call work.

Name	Type	Description
wrapupEndTime	DateTime	The time stamp when wrap up was completed.
wrapupName	String	The user configured wrap up name.
wrapupNotes	String	Text entered by the agent to describe the call or disposition.

[1] *isConference: when the "maxparticipants" property is set on the conversation object.*

[2] *isInternal: when there is no participant of purpose, "customer" or "external", on the conversation.*

[3] *isTransfer: when the original agent that handled the conversation is no longer in a connected state on the interaction or they're in the consult phase of a two-step transfer.*

Open Flow in Primary Tab

Pops a Salesforce Screen Flow as a primary tab.

Applicable uses:
- In a Screen Flow triggered by OneView.

Inputs
- Flow name (required): The API name of the flow to pop.
- (1) Parameter name (optional): The name of the argument to pass into the flow.
- (1) Parameter value (optional): The value of the argument that corresponds to the numbered name.
- (2) Parameter name (optional): The name of the argument to pass into the flow.
- (2) Parameter value (optional): The value of the argument that corresponds to the numbered name.
- (3) Parameter name (optional): The name of the argument to pass into the flow.
- (3) Parameter value (optional): The value of the argument that corresponds to the numbered name.
- (4) Parameter name (optional): The name of the argument to pass into the flow.
- (4) Parameter value (optional): The value of the argument that corresponds to the numbered name.
- (5) Parameter name (optional): The name of the argument to pass into the flow.
- (5) Parameter value (optional): The value of the argument that corresponds to the numbered name.
- (6) Active (optional): If true, brings the popped primary tab into focus.
- (7) Conversation Id (optional): The embedded controls will only show the conversation specified. Enabling this is recommended.
- (8) Tab Label (optional): The label of the popped primary tab. It defaults to the name of the initiated flow.

Outputs
- Primary Tab Id: The Id of the tab that was popped. Used when opening subtabs to specify the primary tab they're associated with.

Open Flow in Sub Tab

Pops a Salesforce Screen Flow as a primary tab.

Applicable uses:
- In a Screen Flow triggered by OneView.

Inputs
- Flow name (required): The API name of the flow to pop.
- (1) Parameter name (optional): The name of the argument to pass into the flow.
- (1) Parameter value (optional): The value of the argument that corresponds to the numbered name.
- (2) Parameter name (optional): The name of the argument to pass into the flow.
- (2) Parameter value (optional): The value of the argument that corresponds to the numbered name.
- (3) Parameter name (optional): The name of the argument to pass into the flow.
- (3) Parameter value (optional): The value of the argument that corresponds to the numbered name.
- (4) Parameter name (optional): The name of the argument to pass into the flow.
- (4) Parameter value (optional): The value of the argument that corresponds to the numbered name.
- (5) Parameter name (optional): The name of the argument to pass into the flow.
- (5) Parameter value (optional): The value of the argument that corresponds to the numbered name.
- (6) Active (optional): If true, brings the popped primary tab into focus.
- (7) Conversation Id (optional): The embedded controls will only show the conversation specified. Enabling this is recommended.
- (8) Tab Label (optional): The label of the popped primary tab. Defaults to the name of the initiated flow.
- (9) Primary Tab Id (optional): The primary tab Id to open the sub tab under. Defaults to the focused primary tab.

Open Record In Primary Tab

Pops a record as a primary tab.

Applicable uses:
- In a Screen Flow triggered by OneView.
- In a Lightning App Flow.

Inputs
- Object Type (required): The type of Salesforce object (e.g., Account).
- Record Id (required): The Salesforce record Id of the object to pop.
- Active (optional): If the popped primary tab should be in focus. Defaults to true.
- Conversation Id (optional): The conversation id of the interaction.

Outputs
- Primary Tab Id: The Salesforce tab id of the popped primary tab.

Recommendation: When Conversation Id input is included, the primary tab and the embedded controls included within are associated with the specified conversation.

Open Record In Sub Tab

Pops a record as a sub tab.

Applicable uses:
- In a Screen Flow triggered by OneView.
- In a Lightning App Flow.

Inputs
- Object Type (required): The type of Salesforce object (e.g., Account).
- Record Id (required): The Salesforce record Id of the object to pop.
- Active (optional): If the popped primary tab should be in focus. Defaults to true.
- Conversation Id (optional): The conversation id of the interaction.
- Primary Tab Id: The Salesforce tab id of the popped primary tab to use to pop the sub tab. Defaults to focused primary tab

Recommendation: When Conversation Id input is included, the primary tab and the embedded controls included within are associated with the specified conversation.

Open URL In Primary Tab

Pops a URL as a primary tab.

Applicable uses:
- In a Screen Flow triggered by OneView.
- In a Lightning App Flow.

Inputs
- url (required): The URL to pop.
- Active (optional): If the popped primary tab should be in focus. Defaults to true.
- Conversation Id (optional): The conversation id of the interaction.

Outputs
- Primary Tab Id: The Salesforce tab id of the popped primary tab.

Recommendation: When Conversation Id input is included, the primary tab and the embedded controls included within are associated with the specified conversation.

Open URL in Sub Tab

Pops a URL as a sub tab.

Applicable uses:

- In a Screen Flow triggered by OneView.
- In a Lightning App Flow.

Inputs

- url (required): The URL to pop.
- Active (optional): If the popped primary tab should be in focus. Defaults to true.
- Conversation Id (optional): The conversation id of the interaction.
- Primary Tab Id: The Salesforce tab id of the popped primary tab to use to pop the sub tab. Defaults to focused primary tab

Recommendation: When Conversation Id input is included, the primary tab and the embedded controls included within are associated with the specified conversation.

Replace current tab

Applicable uses:

Replaces the tab running the flow with the specified URL.

Input

- URL: The URL to redirect this tab to (e.g., `/lightning/r/Account/0010R00001LMS0XQAX/view`, Lightning, or Visualforce page).

Wait For Login Action

Waits for the user to login or until timeout occurs before continuing with the rest of the flow.

Applicable uses:

- In a Screen Flow triggered by OneView.
- In a Lightning App Flow.

Input

- Seconds to Wait: Maximum amount of time in seconds to wait for the user to login.

Output

- Is Logged In: Returns true if the user is logged in else false.

Recommendation: Start a Salesforce flow with this action to manage scenarios where the flow executes prior to the complete OneView initialization.

Disconnect Action

Disconnects an active conversation.

Applicable uses:

- In a Screen Flow triggered by OneView.
- In a Lightning App Flow.

Inputs

- Conversation Id (required): The conversation id of the interaction to disconnect.

Transfer Action

Performs a blind transfer on an active conversation to a user, queue, or contact.

Applicable uses:

- In a Screen Flow triggered by OneView.
- In a Lightning App Flow.

Inputs

- Conversation Id (required): The Genesys Cloud conversation id of the interaction to be transferred.
- Transfer Target Type (required): Transfer to a specific type of target. Valid values are "user", "contact", or "queue".
- Transfer Target (required): Transfer to a target. Depending on the Transfer Target Type, one of the following transfers takes place:

  If Transfer Target Type is:

  - **user**: Must be a Genesys Cloud user Id.
  - **contact**: Must be a phone number.
  - **queue**: Must be a Genesys Cloud queue Id.

Wrapup Action

Completes conversation with a wrap up code.

Applicable uses:

- In a Screen Flow triggered by OneView.
- In a Lightning App Flow.

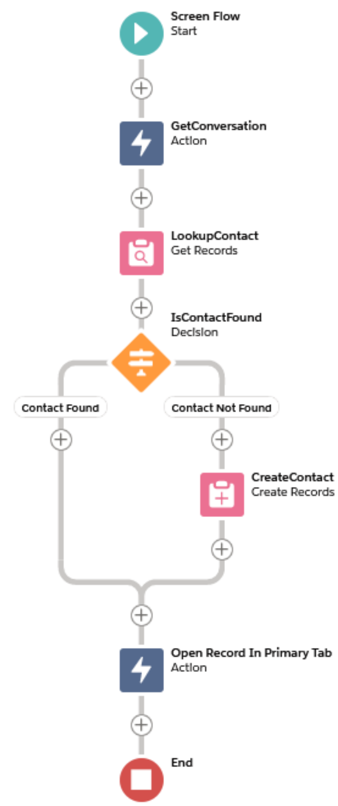
Inputs

- Conversation Id (required): The Genesys Cloud conversation id of the conversation to be completed.
- Wrapup code (required): The Genesys Cloud wrapup code id used to wrap up the conversation.
- Wrapup notes (optional): Wrapup notes for the conversation.

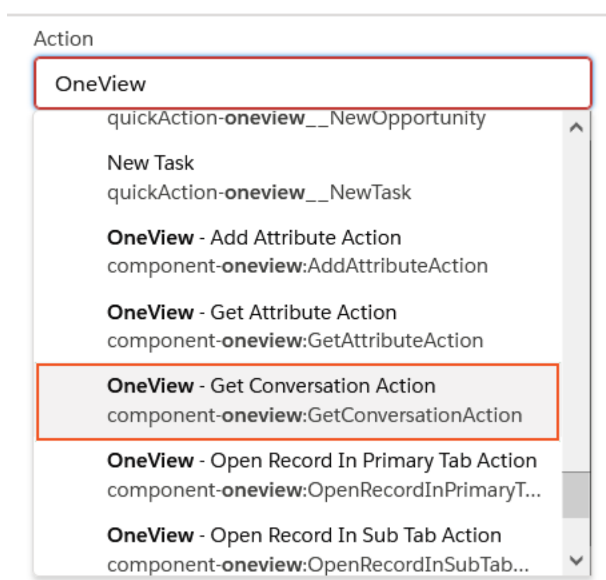
4.1.3 Example Salesforce Flows

Get or create contact with screen pop

This flow looks for an existing customer contact, creates a new one if none exist, and displays the record as a primary tab to the agent.



1. Begin a new screen flow.
2. Add an Action element to your canvas. From the Action search field, type 'OneView' and scroll down to the component actions. Select **OneView - Get Conversation Action**.



3. Enter a Label and API Name for this flow action. For example, *GetConversationData*.

4. In the **conversationId** Input Value field, select **New Resource**.
   a. Select a Resource type of Variable.
   b. API name = conversationId
   c. Data type = Text
   d. Select both Available for input and Available for output.
   e. Click **Done**.
5. Click **Done** on the Action element.
6. Create the contactId variable. See *Create contactId variable*.
7. Add a **Get Records** element to your canvas to search for an existing customer account based on their displayed phone number.
   a. Enter a Label and API Name for this flow element. For example, LookupContact.
   b. Configure the element using the following information:

Section	Parameter	Input
Get Records of this Object	Object	Contact
Filter Account Records	Condition Require-ments	All Conditions Are Met
	Field	Select `Phone`
	Operator	Contains
	Value	Select `Outputs from GetConversation > displayAdress`
Sort Contact Records	Sort Order	Ascending
Storing Records	How many Records to Store	Only the first record
	How to Store Record Data	Choose fields and assign variables
	Where to Store Field Values	In separate variables
Select Variables to Store Contact Fields	Field	Id
	Variable	Select `contactId`

8. Add a **Decision** element to your canvas.
   a. Enter a Label and API Name for this flow element. For example, *IsContactFound*.
   b. Enter a Label and API Name for a New Outcome. For example, *Contact Found*.
   c. Configure the Outcome Details:

Parameter	Input
Condition Requirements to Execute Outcome	All Conditions are Met
Resource	Select contactId
Operator	Is Null
Value	False

d. Click the Default Outcome and edit the Label, *Contact Not Found*.

e. Click **Done**.

9. Add a **Create Records** element to your canvas.
   a. Enter a Label and API Name for this flow element. For example, *CreateContact*.

   b. Configure the element using the following information:

Section	Parameter	Input
Create and Set the Records	How many Records to Create	One
	How to Set the Record Fields	Use separate resources, and literal values
Create a Record of This Object	Object	Contact
Set Field values for the Genesys Cloud Routing Request	Field	Phone
	Value	Select `Outputs from GetConversation` > `displayAddress`

   c. Enable Manually assign variables.

   d. Set the Store Contact ID Variable to `contactId`

   e. Click **Done**.

10. Add an Action element to your canvas. From the Action search field, type 'OneView' and scroll down to the component actions. Select **OneView - Open Record In Primary Tab**.
    a. Enter a Label and API Name for this flow element. For example, *OpenRecord*.

    b. Set Input Values:

Field	Value
object type	Contact
recordId	Select `contactId` variable. (The variable selected in the Get Records action).

    c. Click **Done**.

11. Connect the elements in the flow as per the diagram above.

12. Save and name the flow, for example **OneView - Get or Create Contact**.

Create contactId variable

1. Navigate to Flow Builder, and select Toggle toolbox.

2. Select **New Resource**

3. Resource Type = Variable

4. API name = contactId

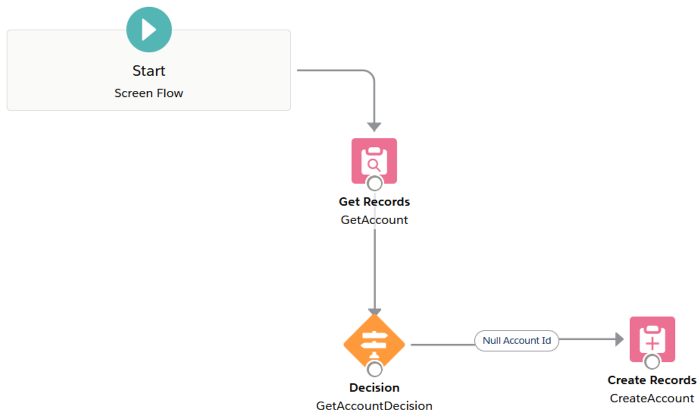
5. Data type = Text

6. Select Available for output

7. Click **Done**

Get or create account

This flow looks for an existing customer account record, or creates a new account.



1. Begin a new screen flow.
2. Create the variable displayAddress. See *Create the displayAddress variable*.
3. Create the variable accountId. See *Create the accountId variable*.
4. Add a **Get Records** element to your canvas to search for an existing customer account.
   a. Enter a Label and API Name for this flow element. For example, *GetAccount*.
   b. Configure the element using the following information:

Section	Parameter	Input
Get Records of this Object	Object	Account
Filter Account Records	Condition Requirements	All Conditions Are Met
	Field	Phone (Account Phone)
	Operator	Contains
	Value	displayAddress
Sort Account Records	Sort Order	Not Sorted
Storing Records	How many Records to Store	Only the first record
	How to Store Record Data	Choose fields and assign variables
	Where to Store Field Values	In separate variables
Select Variables to Store Account Fields	Field	Id
	Variable	accountId
	When no records are returned, set specified variables to null	enable

5. Add a **Decision** element to your canvas.
   a. Enter a Label and API Name for this flow element. For example, *GetAccountDecision*.
   b. Enter a Label and API Name for the New Outcome. For example, *Null Account Id*.

c. Configure the Outcome Details:

Parameter	Input
Condition Requirements to Execute Outcome	All Conditions are Met
Resource	AccountID
Operator	Is Null
Value	True

d. Click **Done**.

6. Create the variable accountName. See *Create the accountName variable*.
7. Add a **Create Records** element to the canvas.
   a. Enter a Label and API Name for this flow action. For example, *CreateAccount*.
   b. Set How Many Records to Create to **One**.
   c. Set How to Set the Record Field, to **Use separate resources, and literal values**.
   d. In the object field, enter `Account`.
   e. Set Field Values for the Account.

Field	Value
Name	accountName
Phone	displayAddress

   f. Enable Manually assign variables.
   g. Set the Store Account ID in Variable to `AccountId`.
   h. Click **Done**.
8. Connect the elements in the flow.
9. Save and name the flow.

Create the *displayAddress* variable

1. Navigate to Flow Builder, and select Toggle toolbox.
2. In the Input Value field, Select **New Resource**.
3. Select a Resource type of **Variable**.
4. API name = displayAddress
5. Data type = Text
6. Select Available for input.
7. Click **Done**.

Create the *accountId* variable

1. Navigate to Flow Builder, and select Toggle toolbox**.**
2. In the Input Value field, Select **New Resource**.

3. Select a Resource type of **Variable**
4. API name = accountId
5. Data type = Text
6. Select Available for output.
7. Click **Done**.

Create the *accountName* variable

1. Navigate to Flow Builder, and select Toggle toolbox.
2. In the Input Value field, Select **New Resource**.
3. Select a Resource type of **Variable**
4. API name = New
5. Data type = Text
6. Select Available for output.
7. Click **Done**.

Set user type on attributes

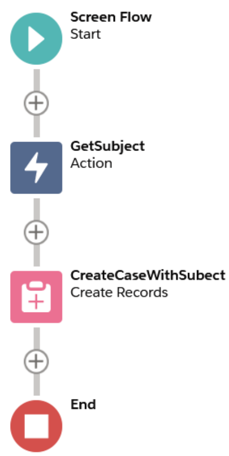
This flow sets the Salesforce user type on the conversation attributes.

1. Begin a new screen flow.
2. Add an Action element to your canvas. From the Action search field, type 'OneView' and scroll down to the component actions. Select **OneView - Add Attribute Action**.
3. Enter a Label and API Name for this flow action. For example, *AddUserType*.
4. In the **attributeName** Input Value field, enter the name of the attribute, for example, `userType`.

5. In the **attributeValue** Input Value field, select **New Resource**.
   a. Select a Resource type of **Formula**.
   b. API name = UserType
   c. Data type = Text
   d. Formula = From the resource list, in the Global Variables section, select `Profile > UserType`.
   e. Click **Done**.
6. In the **conversationId** Input Value field, select **New Resource**.
   a. Select a Resource type of **Variable**.
   b. API name = conversationId
   c. Data type = Text
   d. Select both Available for input and Available for output.
   e. Click **Done**.
7. Connect the element in the flow and save.

Set subject on a case from attributes

This flow gets the subject from a conversation and creates a case with that subject information.



1. Begin a new screen flow.
2. Add an Action element to your canvas. From the Action search field, type 'OneView' and scroll down to the component actions. Select **OneView - Get Attribute Action**.
3. Enter a Label and API Name for this flow action. For example, *GetSubject*.
4. In the **attributeName** Input Value field, select New Resource.
   a. Select a Resource type of **Variable**.
   b. API name = subject
   c. Data type = text

d. Select both Available for input and Available for output.

e. Click **Done**.

5. In the **conversationId** Input Value field, select New Resource.
   a. Select a Resource type of **Variable**.

   b. API name = conversationId

   c. Data type = Text

   d. Select both Available for input and Available for output.

   e. Click **Done**.

6. Add a **Create Records** element to the canvas.
   a. Enter a Label and API Name for this flow action. For example, *CreateCaseWithSubject*.

   b. Set How Many Records to Create to **One**.

   c. Set How to Set the Record Field, to **Use separate resources, and literal values**.

   d. In the **object** field, enter `Case`.

   e. Set Field Values for the Account

Field	Value
Subject	Select `Outputs` `from` `GetSubject` > `attributeValue`

   f. Click **Done**.

7. Connect the elements in the flow.

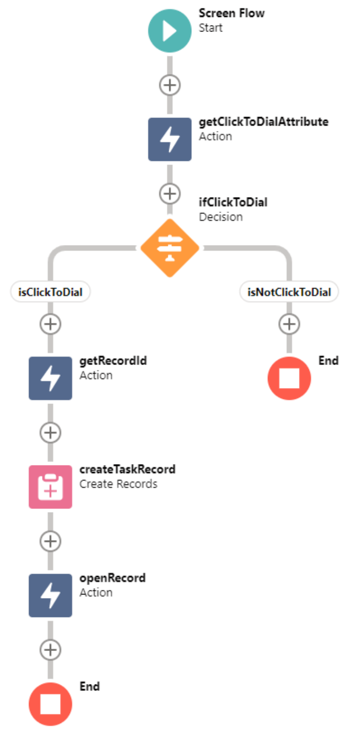
8. Save and name the flow.

Get click-to-dial attributes

The flow checks if a Genesys Cloud interaction was initiated by a Click-to-Dial action, retrieves the record ID of the Salesforce record clicked, and creates a new task to screen pop as a sub tab.

Important: This click-to-dial flow must be configured to trigger on *connect*. See *Configure OneView settings*

For more information on the data available, see *Click-to-dial data*.



1. Begin a new screen flow.
2. Add an Action element to your canvas. From the Action search field, type 'OneView' and scroll down to the component actions. Select **OneView - Get Attribute Action**.
   a. Enter a Label and API Name for this flow action. For example, *getClickToDialAttribute*.
   b. In the **attributeName** Input Value field, enter `oneView_clickToDial`.
   c. In the **conversationId** Input Value field, select New Resource.
      i. Select a Resource type of **Variable**.
      ii. API name = conversationId
      iii. Data type = Text
      iv. Select both Available for input and Available for output.
      v. Click **Done**.
3. Add a **Decision** element to your canvas.
   a. Enter a Label and API Name for this flow element. For example, *IfClickToDial*.
   b. Enter a Label and API Name for a New Outcome. For example, *IsClickToDial*.

c. Configure the Outcome Details:

Parameter	Input
Condition Requirements to Execute Outcome	All Conditions are Met
Resource	Select `Outputs from getClick-ToDialAttribute > attributeValue`
Operator	Equals
Value	True

d. Click the Default Outcome and edit the Label, *IsNotClickToDial*.

e. Click **Done**.

4. Add an Action element to your canvas. From the Action search field, type 'OneView' and scroll down to the component actions. Select **OneView - Get Attribute Action**.
   a. Enter a Label and API Name for this flow action. For example, *getRecordId*.
   b. In the **attributeName** Input Value field, enter `recordId`.
   c. In the **conversationId** Input Value field, select New Resource.
      i. Select a Resource type of **Variable**.
      ii. API name = conversationId
      iii. Data type = Text
      iv. Select both Available for input and Available for output.
      v. Click **Done**.
5. Add a **Create Records** element to the canvas.
   a. Enter a Label and API Name for this flow action. For example, *createTaskRecord*.
   b. In the **object** field, enter `Task`.
   c. Set Field Values for the Task

Field	Value
Description	Select `Outputs from getClickToDialAttribute > attributeValue`
WhoId	Select `Outputs from getRecordId > attributeValue`

   d. Click **Done**.
6. Add an Action element to your canvas. From the Action search field, type 'OneView' and scroll down to the component actions. Select **OneView - Open Record In Sub Tab**.
   a. Enter a Label and API Name for this flow element. For example, *openRecord*.
   b. Set Input Values:

Field	Value
object type	Task
recordId	Select `TaskId from createTaskRecord` variable. (The id from the createTaskRecord element.)
Active	Select `GlobalConstant.True`
Conversation Id	Select `conversationId` variable

c. Click **Done**.

7. Connect the elements in the flow.

8. Save and name the flow.

Reminder: This click-to-dial flow must be configured to trigger on *connect*. See *Configure OneView settings* > *step 8* to configure Flow Triggers.

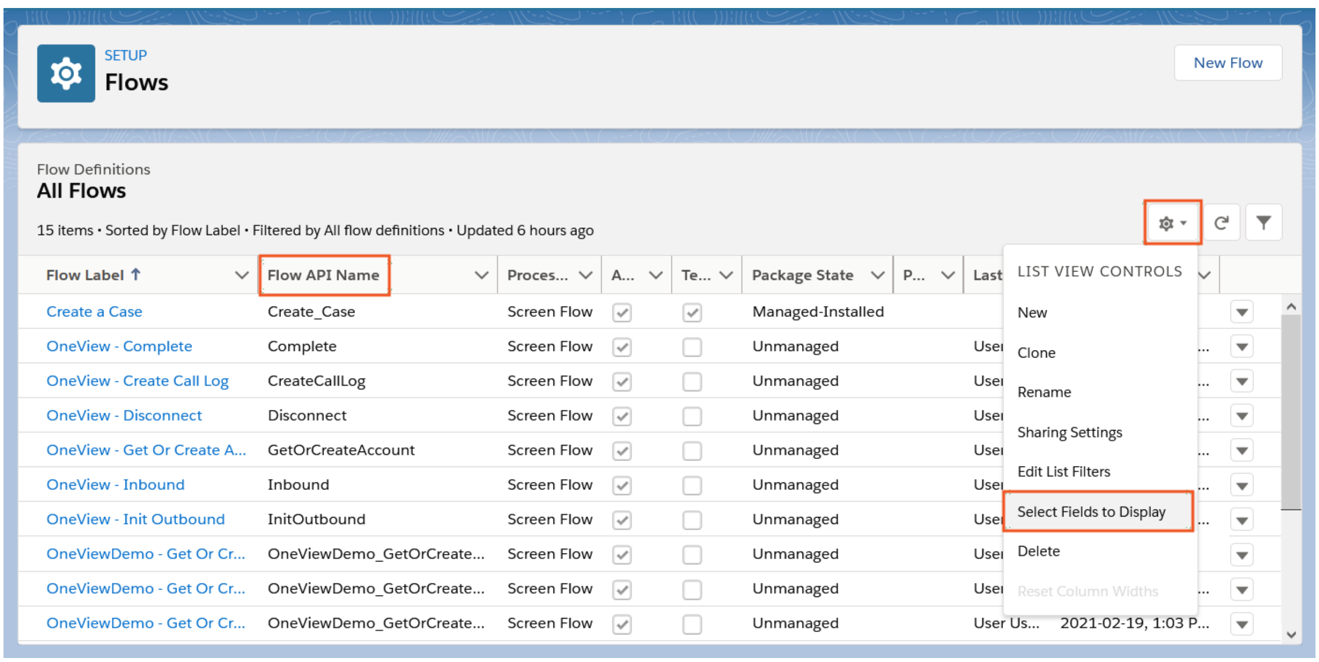
4.2 Triggering flows

Salesforce flows may be triggered in different ways:

- via OneView Settings page. See *Configure OneView settings*.
- via participant data using Genesys Cloud Architect. See *Trigger flows via participant data*.
- via outbound campaign calling lists. See *Trigger flows via outbound calling lists*.

Important: Configuring more than one method to trigger the same flow may create conflicts and/or duplications. Recommend only configuring one method per flow.

Configuration in Genesys Cloud Architect and an outbound calling list uses the API Name of the Salesforce flow. To easily locate the API Names of your flows, add the *Flow API Name* column to the All Flows view.



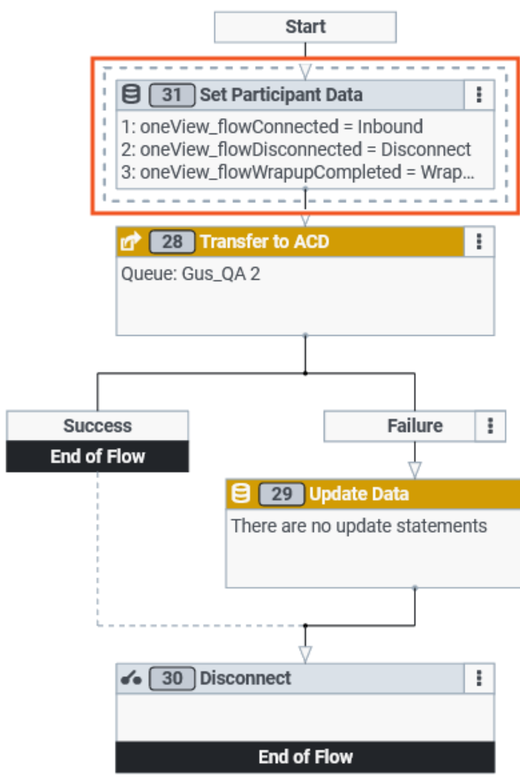
4.2.1 Trigger flows via participant data

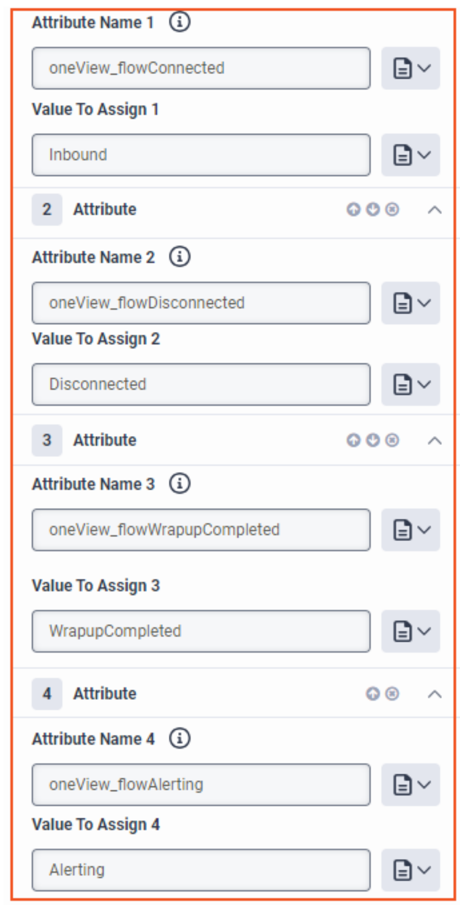
Salesforce Flows can be triggered by Genesys Cloud Architect using OneView attribute keys to connect to the API names of a Salesforce flow.

For more information about Genesys Cloud Architect Flows, see https://help.mypurecloud.com/articles/architect-overview/.

1. In Genesys Cloud Architect, access your designated Inbound flow.
2. Add a **Set Participant Data** block and set the attributes as follows:

Attribute Name	Value to Assign	Description
oneView_flowAlerting	API Name of your Salesforce Alerting Flow	Triggered when a inbound conversation is alerted.
oneView_flowConnected	API Name of your Salesforce Inbound Flow	Triggered when a call is connected.
oneView_flowDisconnected	API Name of your Salesforce On Disconnected Flow	Triggered when a conversation is disconnected/ rejected.
oneView_flowComplete	API Name of your Salesforce On Complete Flow	Triggered when ACW is completed on a conversation. **Note:** Only applies to conversations with an ACW portion.





3. Save your changes.

4.2.2 Trigger flows via outbound calling lists

Salesforce Flows can be triggered from an outbound campaign calling list on per contact basis.

1. As required for the campaign, add the appropriate columns to the comma-separated value (.csv) file associated with the outbound campaign.

   All the columns are not required; only the ones applicable to the campaign.

   - oneView_flowAlerting
   - oneView_flowConnected
   - oneView_flowDisconnected
   - oneView_flowWrapupCompleted
   - oneView_flowDialerPreview

   , the value associated with that column that represents a SF flow will be triggered.

2. Enter the flow's API name in the appropriate column for each contact.

A	B	C
Number	Id	oneView_flowConnected
1234567890	first contact	flowA
9876543210	second contact	flowB

3. Upload the CSV file to the Contacts List in Genesys Cloud. For information on creating calling lists and uploading the CSV file, see https://help.mypurecloud.com/articles/create-new-contact-list/.

5 Voice Outbound Campaign Synchronization

Voice Outbound Campaign Synchronization is a process of aligning and coordinating outbound interactions to provide a seamless experience. It ensures the data associated with a campaign is easily accessible.

Campaigns created or updated in Salesforce will be synchronized with Genesys Cloud Outbound. It helps to view the campaign status, track its progress, and review the call timing information along with other details.

When a Campaign is created in Salesforce, an outbound campaign is automatically generated in Genesys Cloud. The Salesforce Campaign Members are added as contacts in the Genesys Cloud outbound campaign, which is scheduled to run within the start and end dates of the Salesforce Campaign.

There are six types of Genesys Cloud outbound campaigns that OneView supports:

1. Agentless Dialing
2. External Dialing
3. Power Dialing
4. Predictive Dialing
5. Progressive Dialing
6. Preview Dialing

Important: An Outbound campaign must be maintained when utilizing outbound campaign sync in Salesforce. Any changes made in Genesys Cloud will not be reflected in Salesforce.

Prerequisites

- Client Credentials are required for the outbound campaign settings to be configured. See *Client Credentials*.
- OneView Admin permission set must be added to campaign administrators. See *Add users to permission sets*.

5.1 Install campaign sync package

URL: https://login.salesforce.com/packaging/installPackage.apexp?p0=04tOG0000000IMjYAM

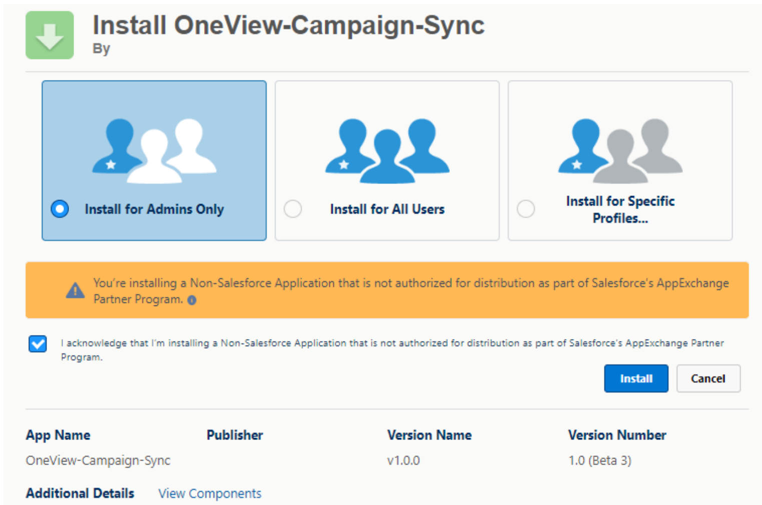
Version: 1.1.0

Note: Users must have OneView 4.0 package installed in their environment before installing Campaign Sync package.

Important:

- Keep a copy of the package link for future reference to ensure the same version is installed in both your sandbox and production environments. The package link published on our OneView confirmation page is updated when a new version is released.
- When installing the package into a sandbox, change the domain name of the link to the sandbox install URL (e.g., test.salesforce.com) and remove the symbol "~" at the end of the URL.

1. Upon clicking the link, the user is redirected to the Salesforce login page.
2. Select **Install for Admins Only** (recommended) and the acknowledgment statement to approve the install.



3. Click **Install**.
4. When installation is complete, click **Done**.

5.2 Configure campaign sync

5.2.1 Assign roles to your user

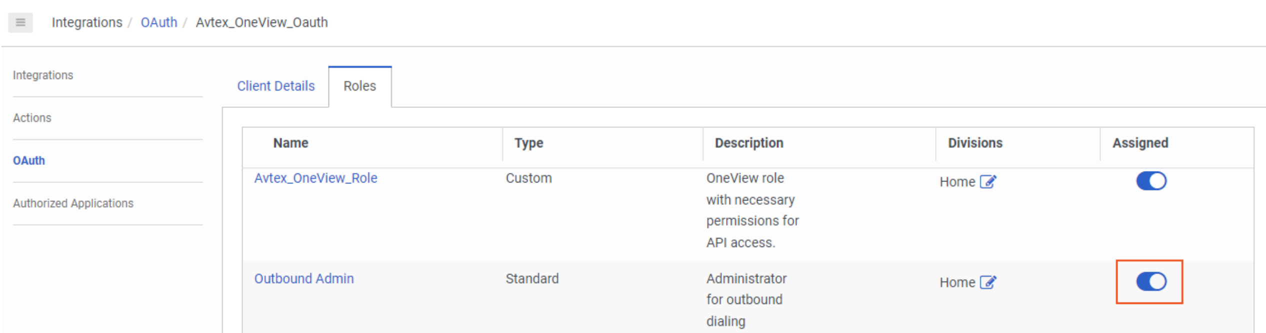
1. In Genesys Cloud, go to **Admin > Roles / Permissions**.
2. Search and select the **Outbound Admin** role.
3. Click **Change Membership**.
4. Add yourself to this role and click **Save**.
5. Click **Save**.
6. Search and select the **Avtex_OneView_Role** role.
7. Click **Change Membership**.

8. Add yourself to this role and click **Save**.
9. Click **Save**.

Important: To proceed with the OAuth client editing in next section, user must have the roles identical to the OAuth client.

5.2.2 Assign Outbound Admin role to the OAuth client in Genesys Cloud

1. Go to **Admin > OAuth**.
2. Open the OAuth client for OneView, **Avtex_OneView_Oauth**.
3. Click the **Roles** tab.
4. Toggle the **Assigned** slider to enable the **Outbound Admin** role.

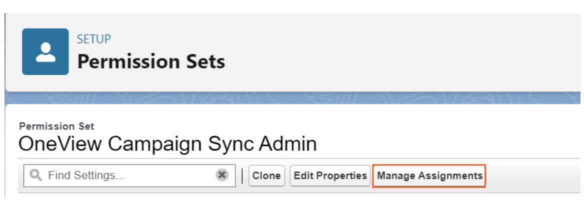


5. Click **Save**.

5.2.3 Add permission sets to the user

See *OneView permission set detail* for information on permissions.

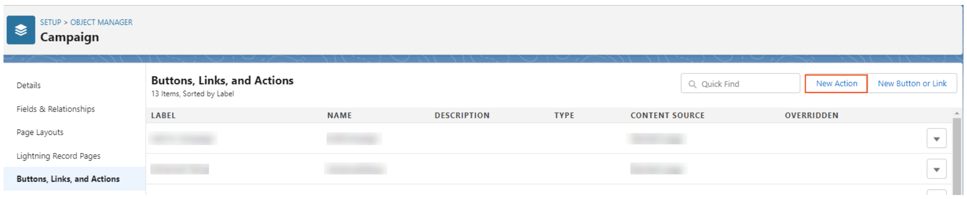
1. From Setup using the Quick Find box, search for and select **Permission Sets**.
2. Select **OneView Campaign Sync Admin** from the Permission Set Label to edit.
3. Click **Manage Assignments.**



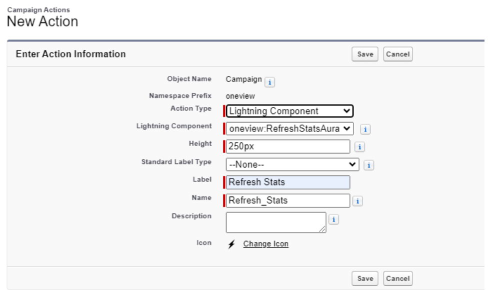
4. Click **Add assignments**, to add users to the permission set.
5. Select the user you want to add and click **Assign**.
6. Click **Done**.

5.2.4 Create a Refresh Stats button

1. In Salesforce, from Setup select **Object Manager**.
2. Go to **Campaign**.
3. From Buttons, Links and Actions, click **New Action**.



4. Set the fields Action Type to **Lightning Component** and Lightning component to **RefreshStatsAura**.
5. Name the Label **Refresh Stats**.



6. Click **Save**.

   Result: A new Refresh Stats button is created and available in Buttons, Links and Actions section.

5.2.5 Add campaign fields to the Page Layouts

In Salesforce, go to Setup and select Object Manager.

Campaign:

1. Click **Campaign** from the side navigation pane.
2. Select **Page Layouts**.
3. Select the **Page Layout Name** to be edited.
4. Search for and drag the below fields to the layout page:
   - OneView Outbound Campaign Settings
   - Synchronize Campaign
   - Last Campaign Sync Result

- Last Contact List Sync Result
- Last Campaign Sync Time
- Last Contact List Sync Time
- Progress
- Progress%
- Genesys Cloud Campaign Schedule
- Genesys Cloud Campaign Status
- Genesys Cloud Time Zone.

5. Navigate to Salesforce Mobile & Lightning Experience Actions.
6. Search and drag Refresh Stats.
7. Click **Save**.

Campaign Member:

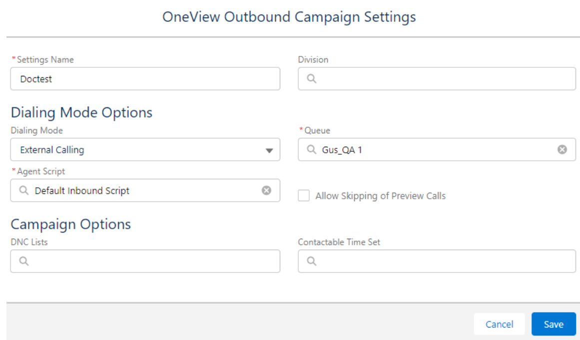
1. Click **Campaign Member** from the side navigation pane.
2. Select **Page Layouts**.
3. Select the **Page Layout Name** to be edited.
4. Search for and drag **Genesys Cloud Result** , **Result Retrieved** fields to the Campaign Member Detail section.
5. Click **Save**.

5.2.6 Outbound settings

Important: Outbound settings object is required and must be configured from the OneView settings page to save a new Salesforce campaign.

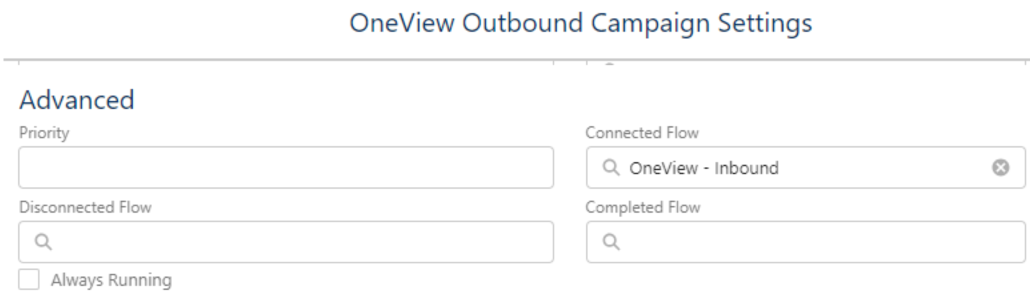
A campaign settings record is created for each dialing mode, which is mapped to multiple Salesforce campaigns. In other words, each dialing mode will have its own campaign records created, and these records can be mapped to multiple Salesforce campaigns.

1. From OneView settings page, select **Outbound Campaign Settings**.
2. Select **New Settings**.
3. Fill in the required fields depending on the dialing modes selected. For more information on the Dialing Mode options, see https://help.mypurecloud.com/articles/dialing-modes/



Note: Agentless dialing mode does not support Transfer to Agent action.

4. If required, Salesforce flows can be configured in the OneView Outbound settings.



Note: Any changes made to the flows after the contacts have been added to the campaign will not be reflected in the campaign.

5. Click **Save**.

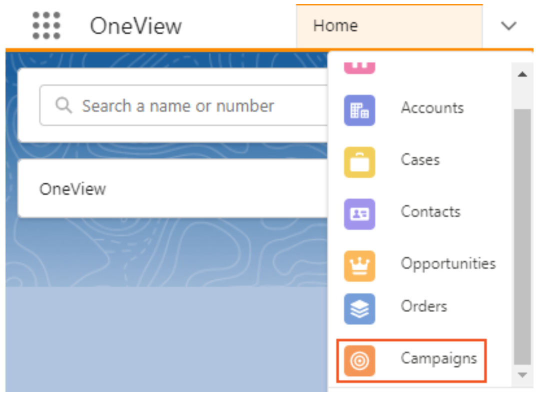
Result: A new Outbound Settings record is created.

5.3 Create a new Salesforce outbound campaign

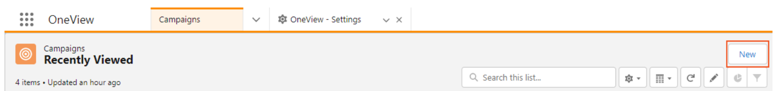
To create a new campaign:

1. From the Home drop-down select **Campaigns**.

Note: For the Campaigns to appear in the drop-down, go to *Home* > *Edit* > *Add More Items* > *Campaigns* > *Add 1 Nav Item*.



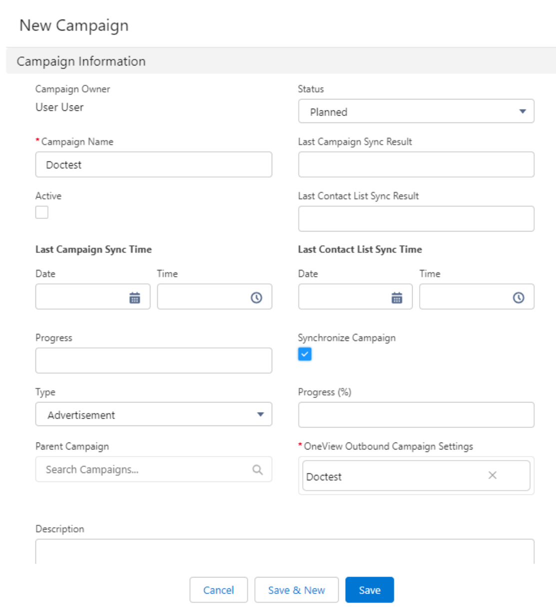
2. Select **New** for the New Campaign form to appear.



3. Fill in the required **Campaign Information** fields to configure a new campaign.
   - **Campaign Name**: Name of the Campaign. (Required)

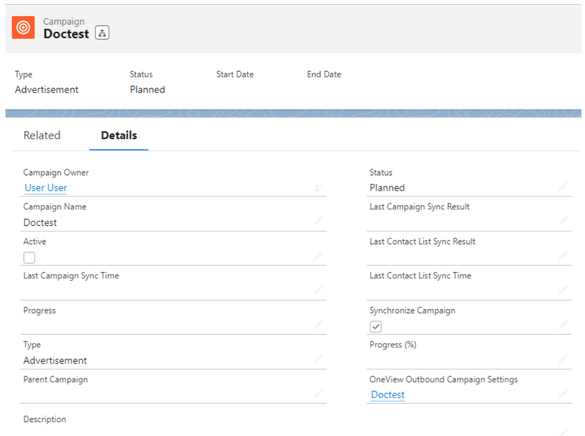
     Note: Recommended to use a unique name to prevent creation of duplicate campaigns and to avoid potential failure of Genesys Cloud resources.
   - **OneView Outbound Campaign Settings**: Search for the outbound campaign settings record created in OneView settings page. (Required)

     Note: If the current Outbound Campaign Settings selection is deleted and a user attempts to edit the Salesforce campaign associated with it, a new selection will be required.
   - **Synchronize Campaign**: Enable to synchronize the campaign to Genesys Cloud. See *View campaign status* for more information.



4. Click **Save**.

   Result: A new Salesforce campaign is created.

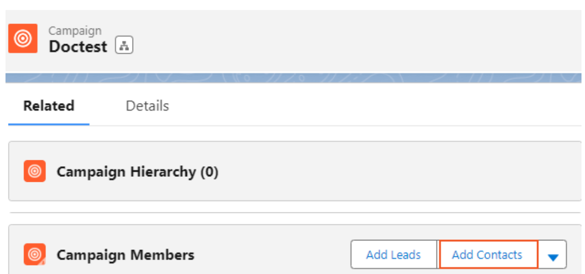


5.3.1 Add member(s) to a campaign

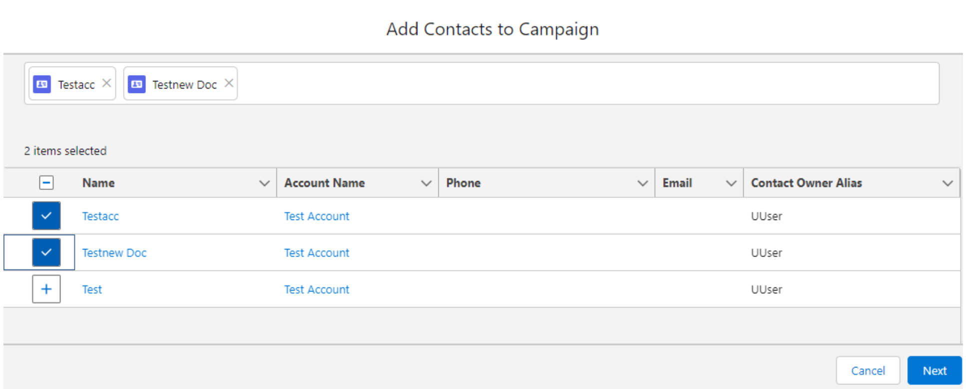
Note: Salesforce allows up to 10,000 campaign list members to be added to the campaign.

To add member(s) to a campaign:

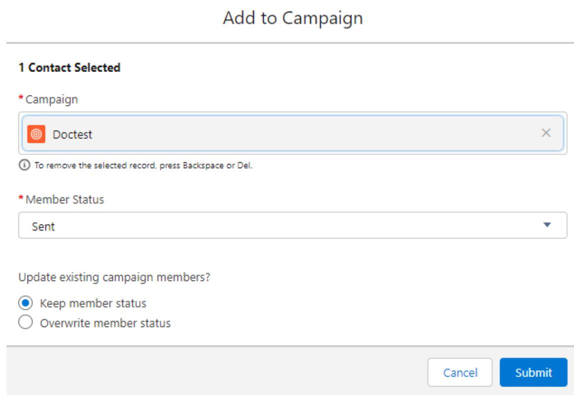
1. Click the **Add Contacts** button in the **Campaign Members** section. Alternatively, click **Campaign Members** to see the Add Contacts button.



2. Select the contact(s) you want to add and click **Next**.



3. Click **Submit**.



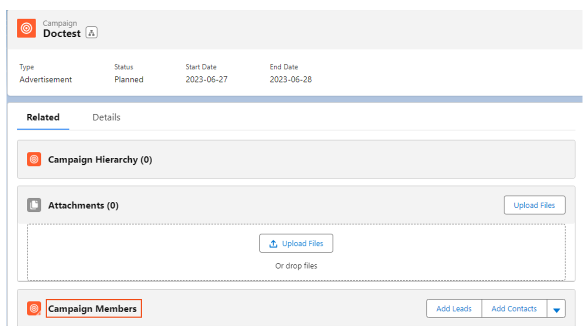
Result: Member(s) are added to the campaign and will reflect as contacts in the Genesys Cloud outbound campaign.

Once the new campaign is created and members are added, its synchronizes and saves the data in Genesys Cloud.

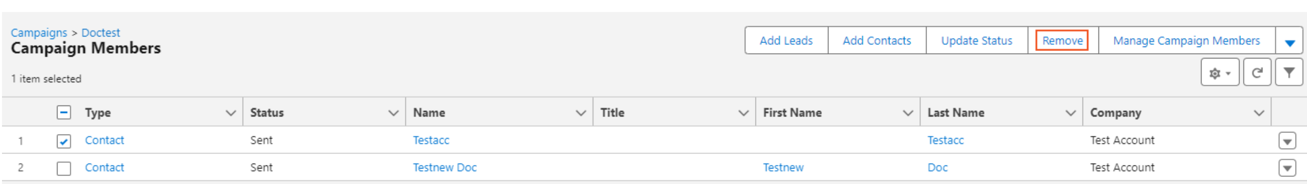
5.3.2 Remove member(s) from a Campaign

To remove member(s) from a campaign:

1. Click **Campaign Members**.



2. Select the member(s) you want to remove.



3. Click **Remove**.

Result: Member(s) is/are removed from the campaign.

To verify the data, log in to *Genesys Cloud* > *Campaign Management* > *Voice Campaigns*.

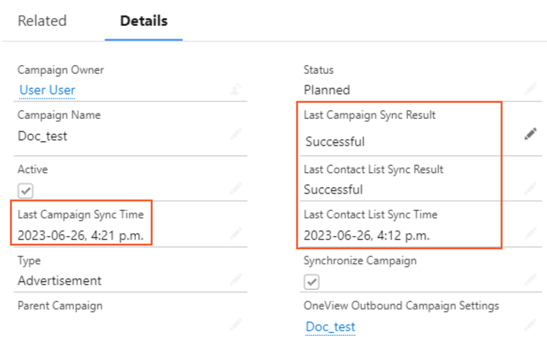
5.4 View campaign status

Campaign status can be viewed in Salesforce campaign. Provides information on the progress of the campaign and any errors encountered during its execution.

- **Last Campaign Sync Result**: Status of the synchronization process for that particular campaign.

  Note: Indicates whether the synchronization was successful or not and shows any errors or issues that need to be addressed.

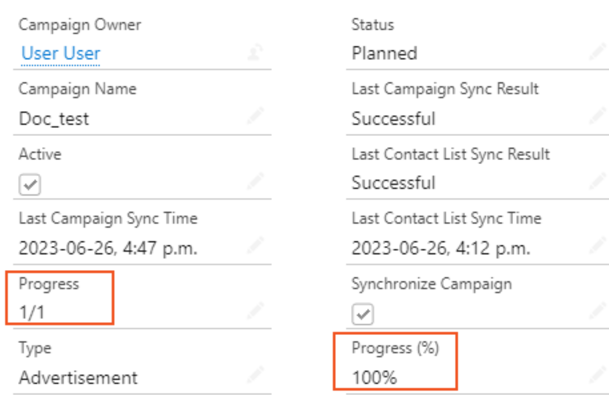
- **Last Contact List Sync Result**: Status of the synchronization process for that specific list.
- **Last Campaign Sync Time**: Specific date and time when the synchronization process for the campaign was last completed.
- **Last Contact List Sync Time**: Specific date and time when the synchronization process for the contact was last completed.



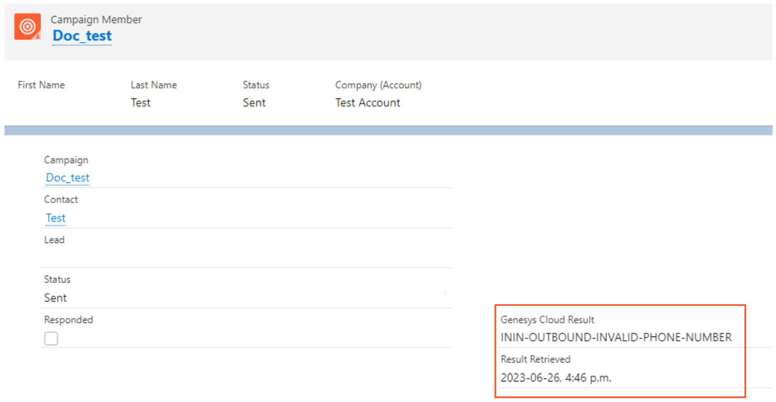
- **Progress:** Progress of the campaign and displays the count of contacts dialed and count of the contacts associated with the campaign. The Progress field is empty until the campaign is started. Clicking the **Refresh Stats** button updates the progress to **Not Started**. As the contacts are dialed, clicking the Refresh Stats button will display the number of dialed contacts.

  Note: Expect possible delays based on Salesforce resources.

- **Progress (%):** Percentage of the campaign that has been completed.



Once the campaign is executed, campaign call status can be viewed from the Campaign Member fields **Genesys Cloud Result** and **Result Retrieved**.

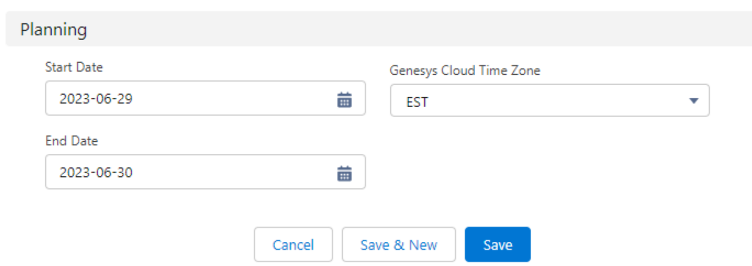


5.5 Schedule a campaign

You can schedule a campaign to execute on specific dates.

Note: Configure the scheduling fields in campaign page layout to appear on the Salesforce campaign.

1. Select the **Start Date** and **End Date** to schedule a campaign.
2. Select the time zone for the campaign to run at a specific time. By default, Salesforce org time is selected.



3. Click **Save**.

6 Email External Routing

Email external routing refers to the process of routing email messages from Salesforce to an external email system or provider.

OneView for Salesforce supports Email-to-Case method for external email routing. It allows users to create cases from incoming email messages. When an email message is received, Salesforce automatically routes the message to the appropriate case based on predefined rules and criteria.

Prerequisites

- **Salesforce**:
  - Must enable Emails in the Object Manager to appear in the OneView settings page during an interaction.
  - To enable, go to *Object Manager* > *Case* > *Case Layouts* > *Related Lists* and search for Emails.
  - Drag Emails to the Related Lists section and click **Save**.
- **OneView settings**: OAuth client must be configured. See *Client Credentials*
- **Genesys Cloud**: Email must be configured on the queue. For more information on ACD email routing and set up, see *https://help.mypurecloud.com/articles/about-acd-email-routing/*

6.1 Email-to-Case setup in Salesforce

To have the Email-to-Case feature setup in Salesforce, follow the steps below:

1. From OneView, go to **Setup**.
2. Search for Email-to-Case.
3. Go to Routing Addresses section and click **New**.
4. Provide the details for mandatory fields:
   - Routing Name
   - Input your own email address in the Email Addresses field.
   - Select Email from Case Origin drop-down.
   - Search for Email-to-Case in the Omni-Channel Flow field.
   - Search for the queue in the Fallback Queue field.
5. Click **Save**.

   Result: You will receive an email from Salesforce to approve the email address that is created.
6. Copy the email address to a temporary file for future use.

6.2 Configure Email-To-Case attribute flow

6.2.1 Add Routing Options to Tabs

Email-To-Case flow must have a unique *Routing Options* object record created in Salesforce.

To create a new *Routing Options* record:

1. From Setup using the Quick Find box, search for and select **Tabs**.
2. Go to Custom Object Tabs and click **New**.
3. From the Object drop-down, select **Routing Options**.
4. Search for and select the desired Tab Style.
5. Click **Next**.
6. Click **Save**.

Result: Routing Options is available in Salesforce to configure.

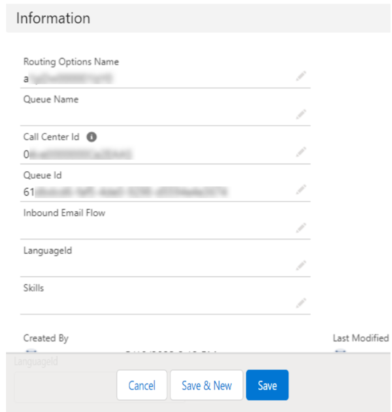
6.2.2 Configure Routing Options

1. Go to the App Launcher and locate **Routing Options**.
2. Click **New**.
3. Enter the following input fields:

- Routing Options Name. (Required)
- Call CenterId: Call Center Id in Salesforce. See *CallCenterId*. (Required)
- Genesys Cloud Queue Id: Genesys Cloud Queue Id through which the email is routed.
- Genesys Cloud Architect Flow Id: Genesys Cloud flow Id used for routing.

  Note: Genesys Cloud Architect Flow Id and Genesys Cloud QueueId cannot be utilized within the same element.
- Genesys Cloud LanguageId: Genesys Cloud language Id used for routing.
- Genesys Cloud Skills: Genesys Cloud Skills used for routing.

4. Click **Save**.



The Routing Options field must be populated with the Routing Options record. The record is utilized for routing within **Genesys Cloud Routing Request** > **Routing Options** field to be used in the email-to-case flow.

6.2.3 Configure the Flow

1. The Flow type must be **Omni-Channel Flow**.
2. Add a **Get Records** element to your canvas to search for an existing case.
   a. Enter a Label and API Name for this flow element. For example, *GetCase*.
   b. Configure the element using the following information:

Section	Parameter	Input
Get Records of this Object	Object	Case
Filter Case Records	Condition Requirements	All Conditions Are Met
	Field	Id
	Operator	Equals
	Value	Record Id
Sort Account Records	Sort Order	Not Sorted
Storing Records	How many Records to Store	Only the first record
	How to Store Record Data	Choose fields and assign variables
	Where to Store Field Values	In separate variables

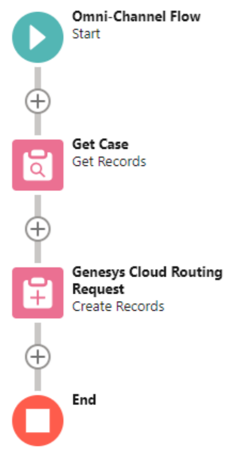
   c. Click **Done**.
3. Add another **Create Records** element to the canvas.
   a. Enter a Label and API Name for this flow action. For example, *Genesys Cloud Routing Request*.
   b. Configure the element using the following information:

Section	Parameter	Input
Create and Set the Records	How many Records to Create	One
	How to Set the Record Fields	Use separate resources, and literal values
Create a Record of This Object	Object	Genesys Cloud Routing Request
Set Field values for the Genesys Cloud Routing Request	Field	RoutingOptions
	Value	Id

Note: Salesforce RecordId in Genesys Cloud Routing Request is utilized to screenpop the record based on the RecordId.

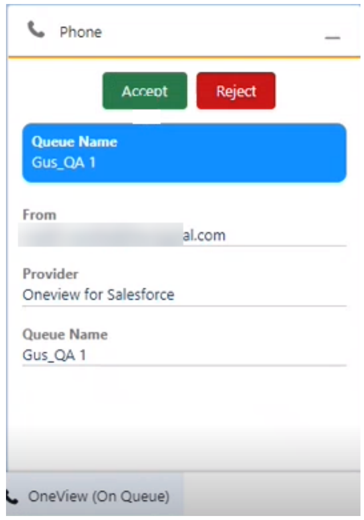
c. Click **Done**.

4. Connect the elements in the flow.
5. Save and name the flow.

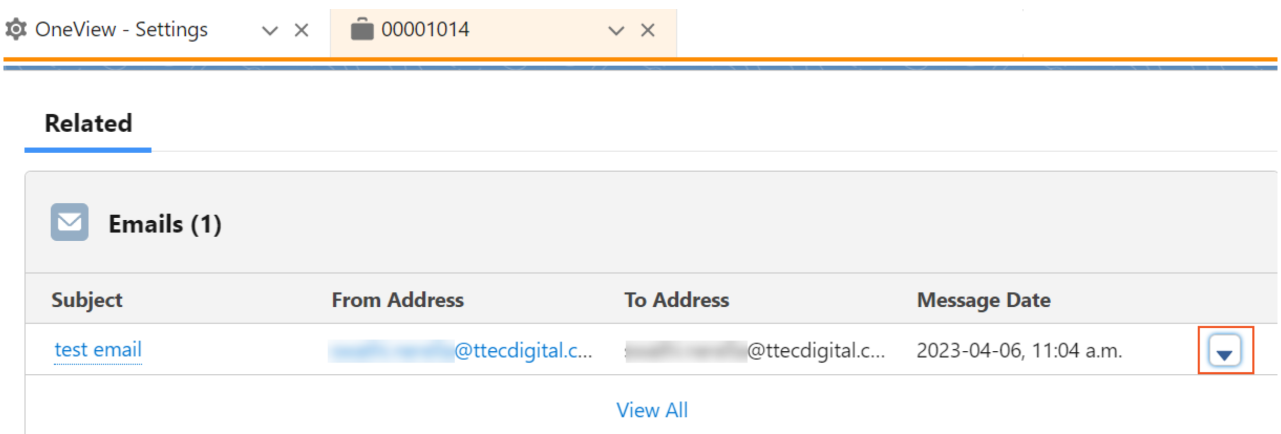


6.3 Initiate an Email-to-Case interaction

1. To initiate Email-to-Case interaction, send an email to the verified email address.
2. An alert with the interaction appears in the OneView CTI panel.



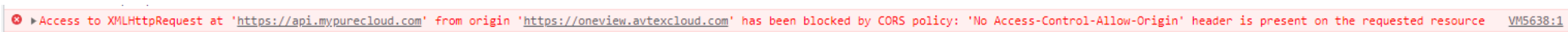
3. Once the interaction is accepted in OneView, case related to the email opens in a new subtab with the Email option.



4. Click the drop-down to **Reply** or **Forward**.
5. Click **Send**.
6. Disconnect the interaction and proceed to Wrap up.

7 Troubleshooting

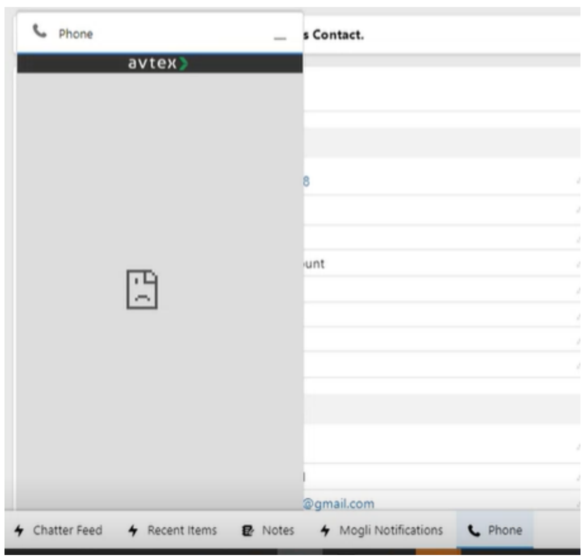
7.1 CORS policy error



This error typically presents itself immediately after the package installation. To resolve, sign out of Salesforce and then sign back in.

7.2 Embedded phone not connecting

If the CTI/embedded phone is not connecting to Genesys Cloud.



Add OneView's URL to the network allowlist: `https://oneview.avtexcloud.com/`

7.3 Flow errors

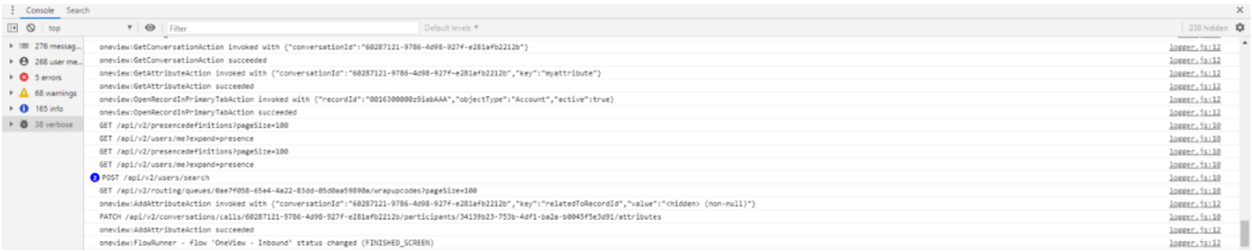
For information on Flow Error Handling, see [https://appex-change.salesforce.com/appxListingDetail?listingId=a0N3A00000FMhi0UAD](https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FMhi0UAD).

Here are some helpful tips:

1. Observe the Flow and Process Error emails if your Flow is not performing as expected. To setup process error emails, see https://help.salesforce.com/articleView?id=sf.flow_troubleshoot_error_email.htm.

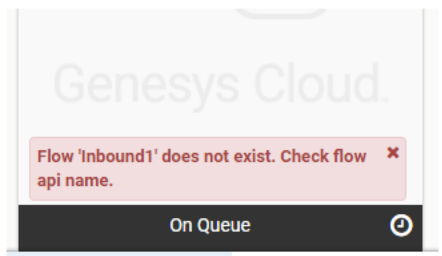
2. Observe the browser Developer Tools logs for OneView actions. For information on accessing browser logs in Chrome, see https://developers.google.com/web/tools/chrome-devtools/console/log.

   For example:



3. If your flow was triggered by OneView, did you remember to specify the conversationId as an input parameter to the flow? See *Flow prerequisites*.
4. An error notification may be presented in the OneView phone providing direction to the issue:
   a. a OneView Flow action encountered a problem.
   b. Incorrect flow name (i.e., API name) used in Genesys Cloud architect.

   For example:



7.4 OneView controls are not visible

Affecting all agents:

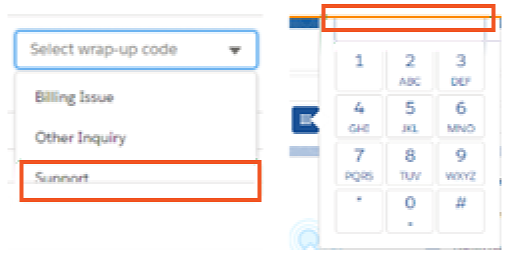
- Ensure the OneView - Embedded Controls component is added to appropriate Lightning pages. See *Add OneView components to Lightning pages*.

Affecting individual agents:

- Ensure the agent is assigned the Genesys Cloud role that contains the integration>oneView>agent permission and the Salesforce profile that contains the custom objects and Visualforce page.

7.5 OneView interaction controls cut off

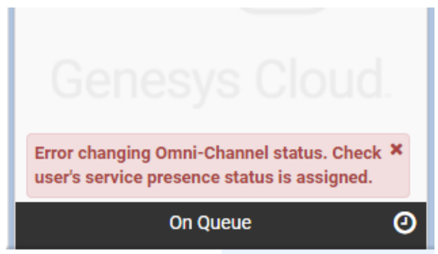
Depending on the amount of content configured on a Salesforce page, drop-down and/or pop-up items such as the directory search, wrap-up code list, or the keypad may be cutoff or appear underneath other Lightning app items.



To improve layout, review the page's content layout. See *Add OneView components to Lightning pages*.

7.6 Omni-Channel status error

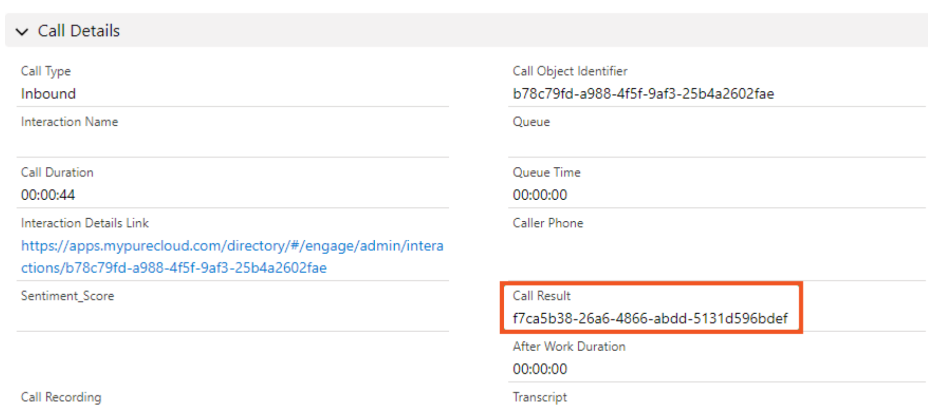
If an Omni-Channel state is configured to sync with a service presence status that is not assigned to an agent, an error is presented to them.



Review *Configure OneView settings* and the agent's Salesforce service presence statuses.

7.7 Wrap up code name not appearing

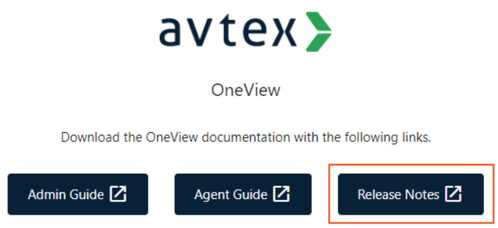
If a wrap up code **id** is displayed in the Call Result field of a completed interaction instead of the wrap up code **name**, review the Salesforce flow applying the wrap up code. An incorrect wrap up code id may be applied.



8 Upgrade OneView

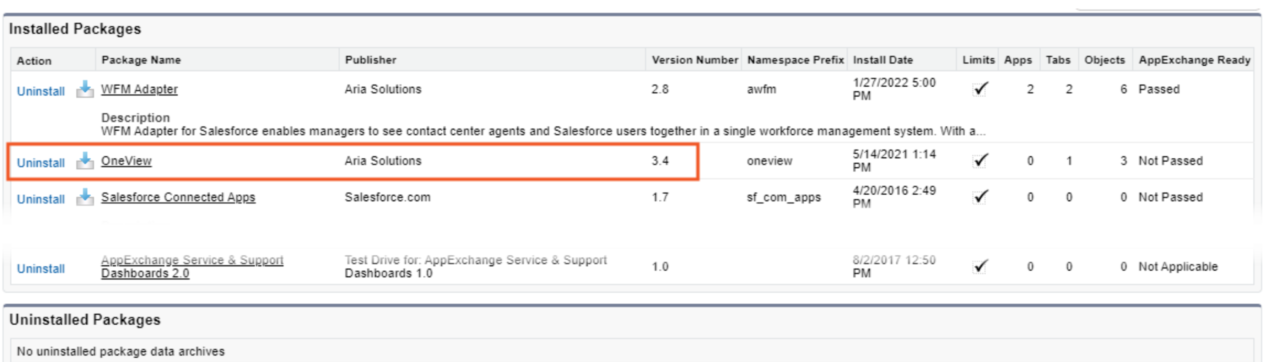
To determine if an upgrade for OneView is available, compare your currently installed package version number to the most recent release communicated in the OneView Release Notes documentation.

1. In Genesys Cloud, go to Apps > OneView for Salesforce.
2. Click the link to download the Release Notes.



8.1 Verify current installed package version

1. In Salesforce, from Setup using the Quick Find box, search for and select **Installed Packages**.
2. Locate **OneView** and the associated Version Number.



Installed Packages

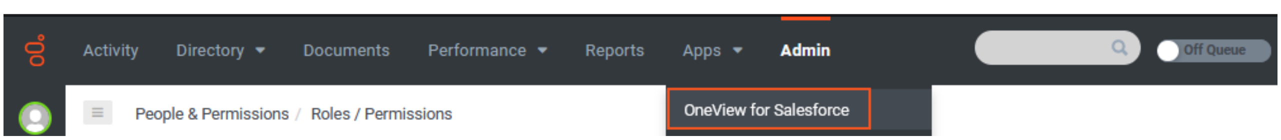
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	WFM Adapter	Aria Solutions	2.8	awfm	1/27/2022 5:00 PM	✓	2	2	6	Passed
	Description WFM Adapter for Salesforce enables managers to see contact center agents and Salesforce users together in a single workforce management system. With a...									
Uninstall	OneView	Aria Solutions	3.4	oneview	5/14/2021 1:14 PM	✓	0	1	3	Not Passed
Uninstall	Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	4/20/2016 2:49 PM	✓	0	0	0	Not Passed
Uninstall	AppExchange Service & Support Dashboards 2.0	Test Drive for: AppExchange Service & Support Dashboards 1.0	1.0		8/2/2017 12:50 PM	✓	0	0	0	Not Applicable

Uninstalled Packages

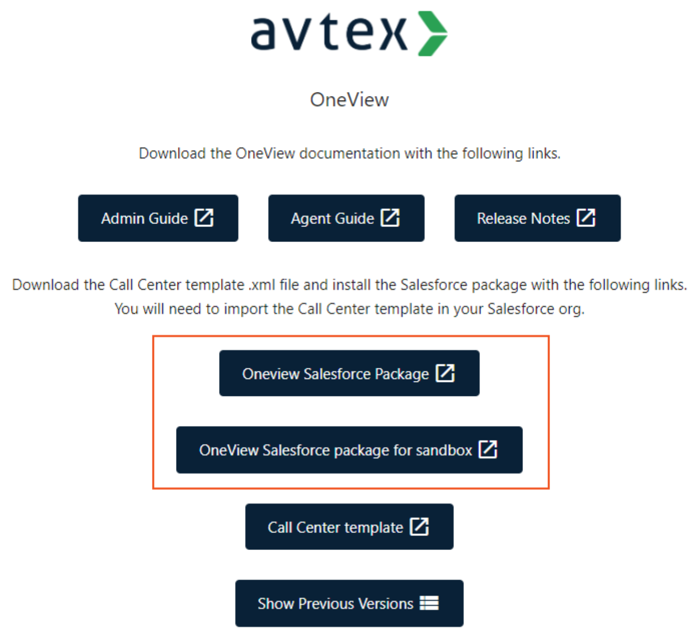
No uninstalled package data archives

8.2 Upgrade the package

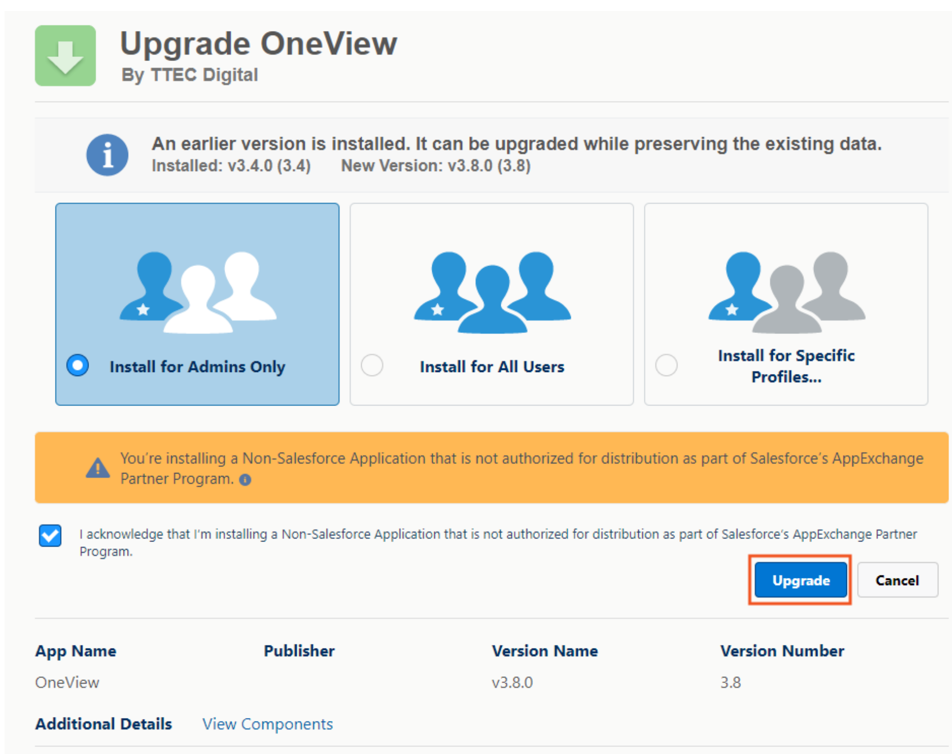
1. In Genesys Cloud, go to Apps > OneView for Salesforce.



2. Click the appropriate Salesforce package for the org you want to update.



3. Sign in to Salesforce.
4. Select the installation preference and the acknowledge statement to approve the upgrade.
5. Click **Upgrade**.

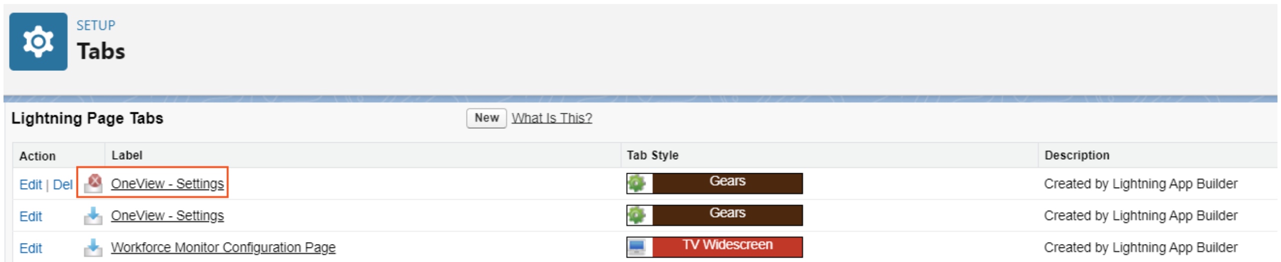


6. Review *Configure OneView* section for new features and options.

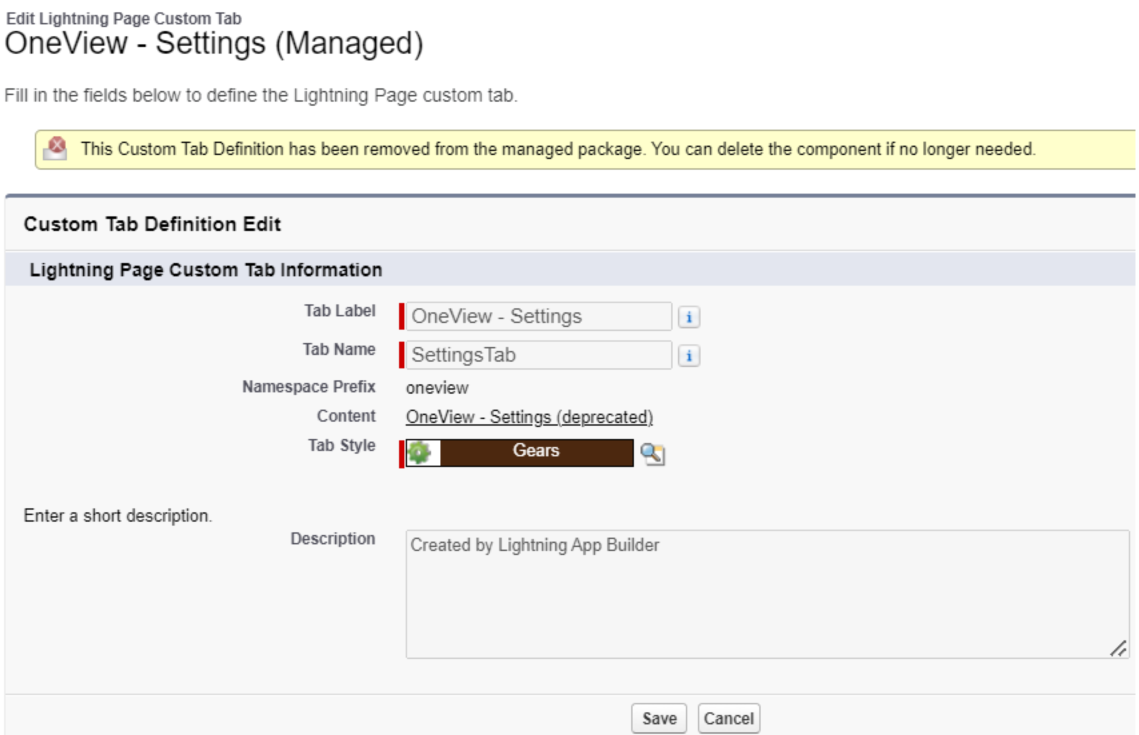
8.3 Remove the old OneView settings page from Salesforce navigation

To remove the old page from navigation:

1. From Setup, search for **Tabs**.
2. Find the OneView - Settings page with a red X next to it.



3. Click **Delete** from this view, or click **Edit** to see the following message before proceeding.



Result: The old OneView - Settings page is removed.

9 Appendix

9.1 Adding new users to OneView

The following tasks must be addressed for new users:

1. Add the customary Genesys Cloud agent permissions for your organization. See *Verify Genesys Cloud agent permissions*.
2. Add the Genesys Cloud role that contains the *integration>oneView>agent* permission. This is the Genesys Cloud role selected during installation, unless changed since.
3. Ensure the users have the necessary Salesforce profiles that provide custom objects and Visualforce pages. See *Add users to permission sets*.
4. New users must be added to the OneView call center in Salesforce. See *Import and edit call center settings*, *Manage call center users > Add more users*.

9.2 OneView permission set detail

Permissions	OneView Admin	OneView Campaign Sync Admin	OneView Agent
Custom objects	Read, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete, View All, Modify All	Read, View all
Custom fields	Read, Edit	Read, Create, Edit, Delete, View All, Modify All	Read
Standard objects		Read, Create, Edit, Delete, View All, Modify All	
Visualforce pages	oneview.Phone oneview.Settings		oneview.Phone
Apex classes	ChatTranscriptController SettingsController TaskAssociationSettings TaskController TaskMedata	CampaignSettingsController RefreshStatsController AppendContactRequestQueueable CampaignController DeleteContactRequestQueueable MaxRequestsExceededException RefreshStatsQueueable SyncCampaignQueueable TimeLimitExceededException	ChatTranscriptController TaskController

OneView custom objects

Note: Permissions are applicable to OneView custom objects and their related custom fields. Agents don't have access to the OneView settings page or administrative functions.

- OneView - Configurations
- OneView - Flow Triggers

- OneView - State Mappings

Campaign Sync custom objects

Note: Permissions are applicable to OneView Campaign Sync custom objects and their related custom fields.

- Append_Contact_Request
- Delete Contact Request
- Genesys Cloud Campaign Schedule
- OneView Outbound Campaign Settings

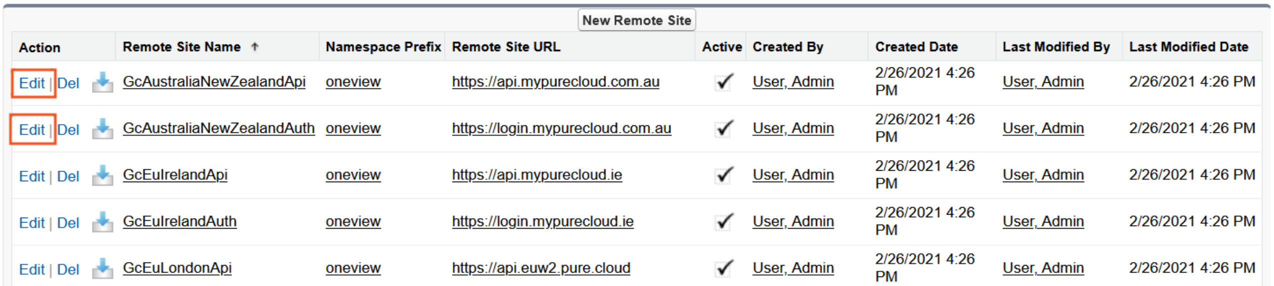
Campaign Sync custom fields for standard objects

Standard objects	Custom fields
Campaign	Genesys Cloud Campaign Status Contact List Id Genesys Cloud Campaign Schedule Campaign Id Last Campaign Sync Result Last Campaign Sync Time Last Contact List Sync Result Last Contact List Sync Time OneView Outbound Campaign Settings Progress Progress (%) Synchronize Campaign Genesys Cloud Time Zone
Campaign Member	Genesys Cloud Result Result Retrieved Synchronized

9.3 Edit permitted Genesys Cloud platform regions (optional)

During installation of the OneView for Salesforce package, all Genesys Cloud regions are permitted to communicate with OneView. These may be edited.

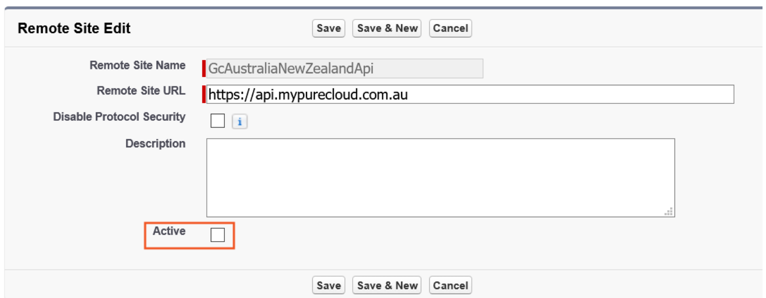
1. From setup using the Quick Find box, search for and select **Remote Site Settings**.
2. Locate the Genesys Cloud Auth and API region(s) you do not use. Click **Edit**.



New Remote Site

Action	Remote Site Name ↑	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
Edit | Del	GcAustraliaNewZealandApi	oneview	https://api.mypurecloud.com.au	✓	User, Admin	2/26/2021 4:26 PM	User, Admin	2/26/2021 4:26 PM
Edit | Del	GcAustraliaNewZealandAuth	oneview	https://login.mypurecloud.com.au	✓	User, Admin	2/26/2021 4:26 PM	User, Admin	2/26/2021 4:26 PM
Edit | Del	GcEuIrelandApi	oneview	https://api.mypurecloud.ie	✓	User, Admin	2/26/2021 4:26 PM	User, Admin	2/26/2021 4:26 PM
Edit | Del	GcEuIrelandAuth	oneview	https://login.mypurecloud.ie	✓	User, Admin	2/26/2021 4:26 PM	User, Admin	2/26/2021 4:26 PM
Edit | Del	GcEuLondonApi	oneview	https://api.euw2.pure.cloud	✓	User, Admin	2/26/2021 4:26 PM	User, Admin	2/26/2021 4:26 PM

3. Clear the **Active** check box.



4. Click **Save**.
5. Repeat for all unused regions.

9.4 Click-to-dial data

When a click-to-dial number is clicked, the following participant data is added to the conversation.

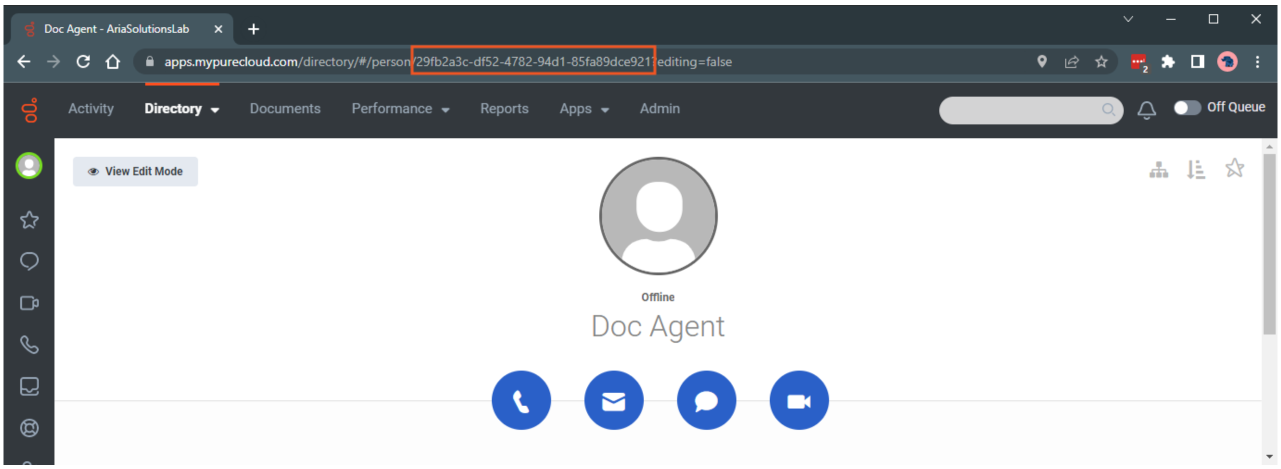
Name	Description
number	Provides the phone number clicked by the user.
recordId	Provides the ID of the record associated with the clicked phone number.
recordName	Provides the name of the record for the clicked phone number.
objectType	Provides the type of record associated with the clicked phone number.
accountId or contactId	If the clicked phone number belongs to a person account, the associated account or contact ID is provided.
personAccount	If the clicked phone number belongs to a person account, this property is `true`. **Note:** If *person accounts* aren't enabled in your org, this field is not included.
oneView_clickToDial	Used to indicate this conversation was initiated with click-to-dial.

This participant data can be accessed through Salesforce flows using the **OneView - GetAttribute** action. See *Get click-to-dial attributes*.

9.5 Locating an Id to use in a flow

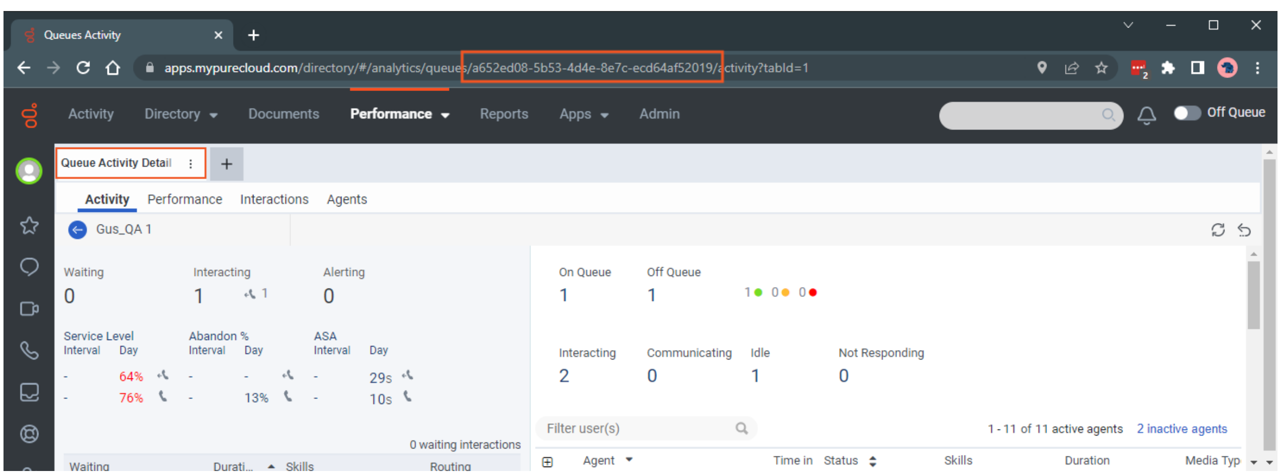
9.5.1 userId

1. In Genesys Cloud, go to Directory > My Organization.
2. Select the agent.
3. In the URL of the selected agent, the userId is displayed.



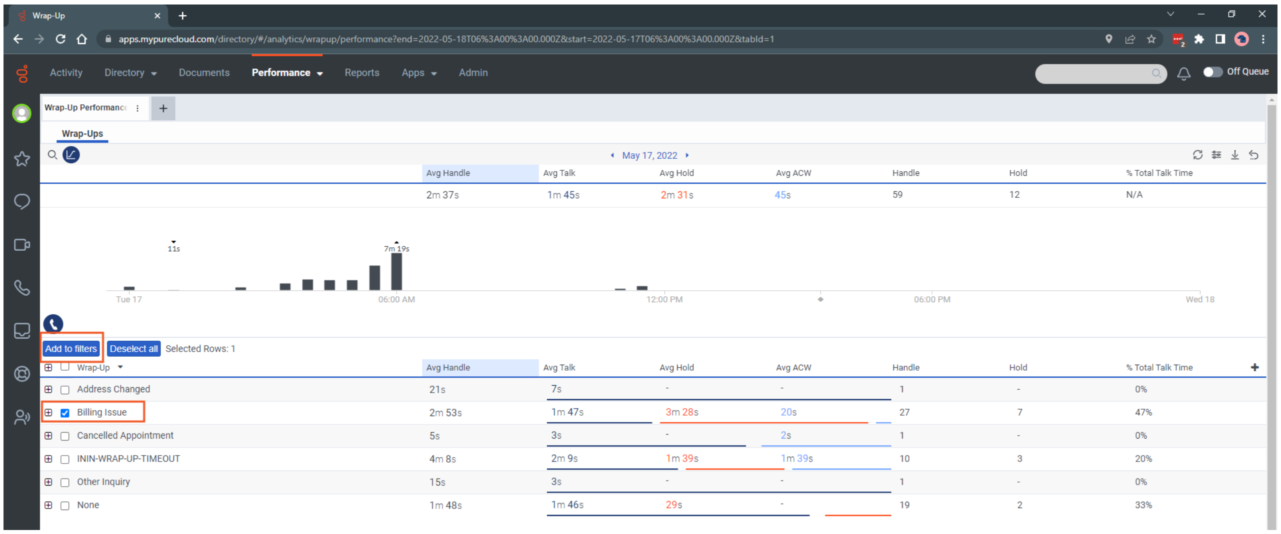
9.5.2 queueId

1. In Genesys Cloud, go to Performance > Workspace > Queue Activity.
2. Select the queue to view the Queue Activity Detail.
3. In the URL of the browser page for the selected queue, the queueId is displayed.

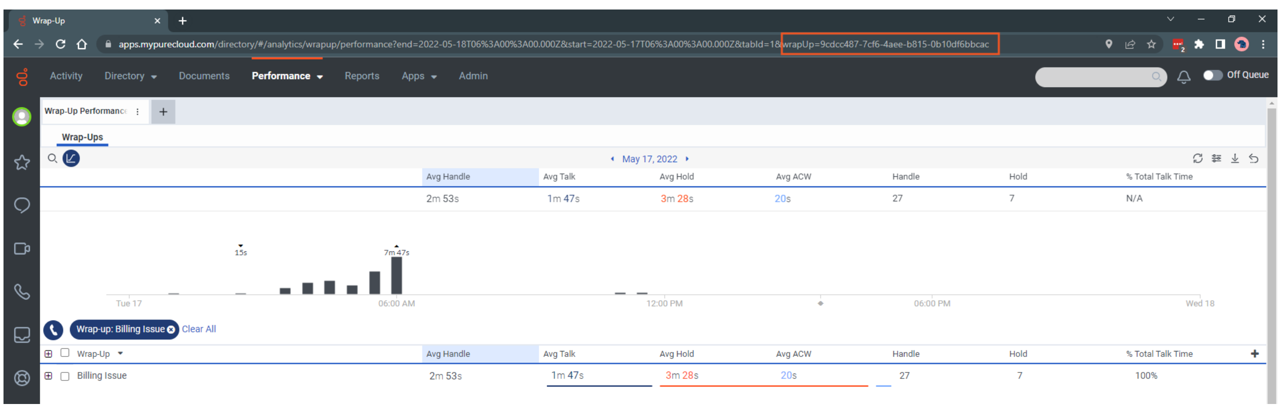


9.5.3 wrapupId

1. In Genesys Cloud, go to Performance > Workspace > Wrap-Up Performance.
2. Select the wrap-up code and click **Add to filters**.



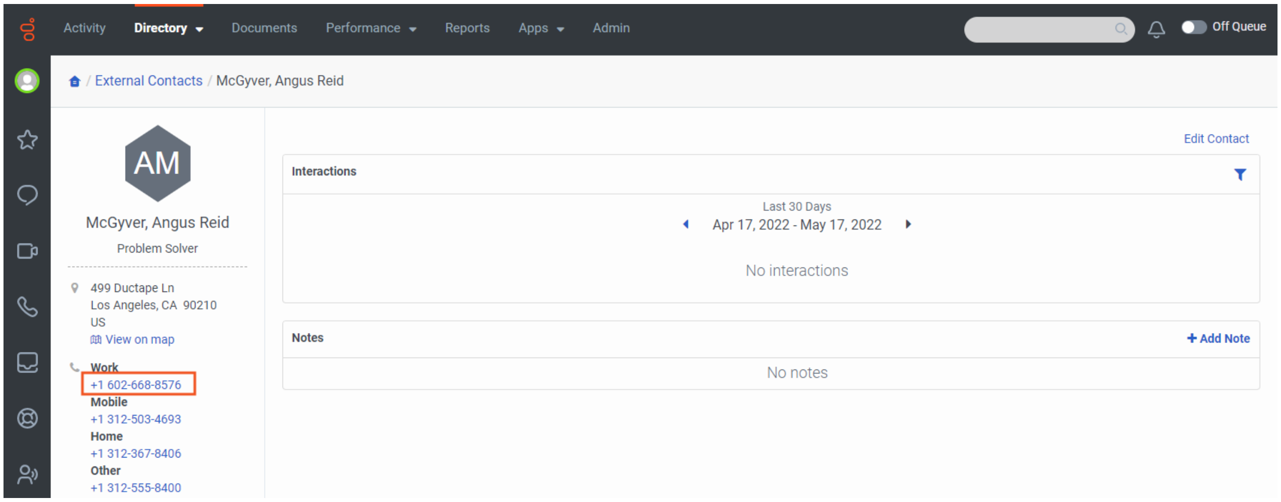
3. In the URL of the browser page of the selected wrap-up code, the wrapupId is displayed.



9.5.4 externalContactId

1. In Genesys Cloud, go to Directory > External Contacts.
2. Select the contact.

3. The phone number of the contact is the unique identifier.



9.5.5 CallCenterId

1. In Salesforce, go to Setup > Developer Console.
2. Run the query `select oneview__CallCenterId__c from oneview__Configuration__c` in the Query Editor and click **Execute**.

3. The CallCenterId from the Query Results is the value for `oneview_CallCenterId_c` field in the CreateRecords.

10 Revision history

Date	Version	Description
April 18, 2024	4.7	Added *Alerting flow* to the Flow Triggers and updated Triggering Flows section.
February 20, 2024	4.6	Added Transfer Workspace to General Options in the OneView settings page.
	1.1	Updated *Voice Outbound Campaign Sync* package link.
January 30, 2024	4.5	Added General Options to the OneView settings page.
October 16, 2023	4.4	Added *Interaction Details* feature to the OneView settings page.
July 25, 2023	4.0	Updated settings page layout. Updated *Install OneView for Salesforce integration* section with new EULA page and Genesys Cloud permissions. Added *Remove the old settings page* in Upgrade OneView section.
	1.0	Added new *Voice Outbound Campaign Synchronization* section.
March 20, 2023	3.16	Added new *Email External Routing* section.
December 12, 2022	3.14	Added OneView custom actions: *Disconnect Action, Transfer Action and Wrapup Action.* Updated Admin and Agent permission sets in Configure OneView section.
September 15, 2022	3.12	Added new OneView custom action: *Get Contact List Attribute Action*.
August 23, 2022	3.11	Added *Task Logging* to *Configure OneView settings*. Added new OneView custom action: *Wait For Login Action*. Added new permissions to the Genesys Cloud agent permissions.
June 23, 2022	3.10	Changed the recommended installation method for the Salesforce package to Install for Admins Only and added section *Configure OneView > Edit Salesforce profiles*.
May 4, 2022	3.8	Added support for triggering flows via outbound calling lists.
March 3, 2022	3.6	Added support for callback interactions. • Updated *Verify Genesys Cloud agent permissions* with callback permission. • Added outputs to support callback interactions to *Get a Genesys Cloud conversation* section. Updated *Import and edit call center settings* with optional SSO window configuration.
January 20, 2022	3.4	Added support for Genesys Cloud Communicate license type. Added language support for French and German.
December 21, 2021	3.1	Updated *Configure OneView's settings*. Updated outputs for *Get a Genesys Cloud conversation*. Added *Click-to-dial data* section to the Appendix.
November 19, 2021	3.0	Updated *Get a Genesys Cloud conversation*.
October 20, 2021	2.4	Added note re: screen pops.
October 5, 2021	2.3	Updated *Open Flow in Primary Tab*.

Date	Version	Description
		Added Open Flow in Sub Tab and Replace Current Tab.
July 21, 2021	2.0	Added support for chat interactions. Added additional troubleshooting topics.
May 28, 2021	1.2	Updated the download process for the Call Center template file.
May 24, 2021	1.2	Added new OneView custom action: *Open Flow in Primary Tab*. Added *Upgrade process*.
April 26, 2021	1.0	Creation of document.