

# OneView for Salesforce Administrator Guide

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CX Optimized

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### Contents

1	Getting started	4
	1.1 Supported functionality	4
	1.2 Browser requirements	5
	1.3 Navigation	
	1.4 OneView URL to allow	
	1.5 Language settings	
	1.6 Verify Salesforce admin permissions	
	1.7 Verify Genesys Cloud admin permissions	
_	1.8 Verify Genesys Cloud agent permissions	
2	Install OneView	
	2.1 Install OneView in Genesys Cloud	
	2.1.1 Add integration permission	
	2.1.2 Install OneView for Salesforce integration	
2	2.2 Install Salesforce managed package	
3	Configure OneView	
	3.1 Add users to permission sets	
	<ul><li>3.2 Import and edit call center settings</li><li>3.3 Configure OneView settings</li></ul>	
	3.3.1 Call Center	
	3.3.2 Requires Credentials	
	3.4 Add OneView to a Lightning app	
	3.5 Add OneView components to Lightning pages	
	3.6 Salesforce softphone layout integration	
4	Salesforce flow automation integration	
	4.1 Creating flows	
	4.1.1 Flow prerequisites	
	4.1.2 OneView custom actions	
	4.1.3 Example Salesforce Flows	40
	4.2 Triggering flows	51
	4.2.1 Trigger flows via participant data	51
	4.2.2 Trigger flows via outbound calling lists	52
5	Voice Outbound Campaign Synchronization	54
	5.1 Install campaign sync package	
	5.2 Configure campaign sync	
	5.2.1 Assign roles to your user	
	5.2.2 Assign Outbound Admin role to the OAuth client in Genesys Cloud	
	5.2.3 Add permission sets to the user	
	5.2.4 Create a Refresh Stats button	
	5.2.5 Add campaign fields to the Page Layouts	
	5.2.6 Outbound settings 5.3 Create a new Salesforce outbound campaign	
	5.3.1 Add member(s) to a campaign	
	5.3.2 Remove member(s) from a Campaign	
	5.3.2 Keniove member(s) non a campaign 5.4 View campaign status	
	5.5 Schedule a campaign	
6	Email External Routing	
J	6.1 Email-to-Case setup in Salesforce	
	$\mathbf{U}$	

6.2 Configure Email-To-Case attribute flow	66
6.2.1 Add Routing Options to Tabs	66
6.2.2 Configure Routing Options	66
6.2.3 Configure the Flow	
6.3 Initiate an Email-to-Case interaction	
7 Troubleshooting	70
7.1 CORS policy error	
7.2 Embedded phone not connecting	70
7.3 Flow errors	
7.4 OneView controls are not visible	
7.5 OneView interaction controls cut off	
7.6 Omni-Channel status error	
7.7 Wrap up code name not appearing	72
8 Upgrade OneView	73
8.1 Verify current installed package version	73
8.2 Upgrade the package	
8.3 Remove the old OneView settings page from Salesforce navigation	75
9 Appendix	
9.1 Adding new users to OneView	76
9.2 OneView permission set detail	
9.3 Edit permitted Genesys Cloud platform regions (optional)	77
9.4 Click-to-dial data	
9.5 Locating an Id to use in a flow	79
9.5.1 userld	79
9.5.2 queueld	79
9.5.3 wrapupld	80
9.5.4 externalContactId	80
9.5.5 CallCenterId	
10 Revision history	82

# 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 <u>https://help.mypurecloud.com/articles/about-genesys-cloud-embeddable-framework/</u>.

## 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 <a href="https://help.mypurecloud.com/articles/send-response-action/">https://help.mypurecloud.com/articles/send-response-action/</a>.

#### 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 <a href="https://help.mypurecloud.com/articles/turn-on-auto-answer-for-agents/">https://help.mypurecloud.com/articles/turn-on-auto-answer-for-agents/</a>.

#### **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 <a href="https://help.mypurecloud.com/articles/configure-click-to-dial/">https://help.mypurecloud.com/articles/configure-click-to-dial/</a>.

#### **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 <a href="https://help.mypurecloud.com/articles/create-queue/">https://help.mypurecloud.com/articles/create-queue/</a>.

• 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 <u>https://help.</u>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 <u>https://help.salesforce.com/s/articleView?id=000325737</u>.

#### 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 <a href="https://help.salesforce.com/articleView?id=sf.distribution\_installing\_packages.htm">https://help.salesforce.com/articleView?id=sf.distribution\_installing\_packages.htm</a>.

# 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 <a href="https://help.mypurecloud.com/articles/check-a-users-permissions/">https://help.mypurecloud.com/articles/check-a-users-permissions/</a>.

### 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 <u>https://help.mypurecloud.com/articles/add-roles/</u>.

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. <b>Note:</b> Not applicable for <i>Communicate</i> users.
Routing > Queue > Search	
Routing > Queue > View	Ability to see queues in directory / phonebook searches.
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	<ul> <li>Provides permission for the administrator to install the OneView for Salesforce integration</li> <li>Assigned to the user roles for licensing.</li> </ul>
OAuth client	Avtex_OneView_Oauth	• Provides the client credential grant to communicate with Salesforce Omni-Channel and provides syn-chronization
		• 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.

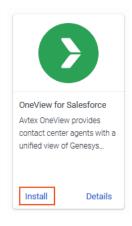
### 2.1.1 Add integration permission

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

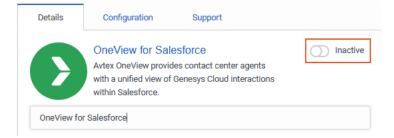
- 1. Sign in to Genesys Cloud, click the Admin menu.
- 2. In the Integrations section, click Integrations.
- 3. Click + Integrations in the upper right corner.

ő	Activity Directory - Do	ocuments Performance 🔻	Reports	Apps 🔻	Admin	۹ :
	■ Integrations / Integrations	3				
\$	Integrations					Integrations
Q	Actions	þearch	Q			

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.

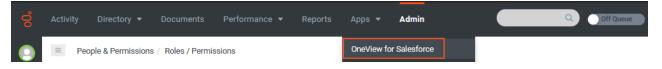


- 6. Once the application has been activated, click **Save**.
- 7. In the Permissions section that appears to the right, the *integration>oneView>agent* permission is presented. This permission needs to be assigned to yourself to proceed with the installation. Click **Add Role**.

Details	Configuration	Support			
OneView fo		Sforce es contact center agents Genesys Cloud interactions	Active	Permissions integration:oneView:agent Roles	0 People
				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.

1	2		3	4
Start	EULA		Permissions	Review and Install
		Product available		
	Download the One	/iew documentation with t	the following links.	
	Admin Guide 🔀	Agent Guide 🔀	Release Notes 🗹	
	Please	e click Start to begin the in	stall.	
		Start		

- 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.

1	2	3	4
Start	EULA	Permissions	Review and Install
Permissions			
For OneView we will need to c OneView permission <b>integrat</b>	-		
Please select the roles to add t	he permission to.		
Search			
Al Agent			^
Agent			
AltoCloud Admin			
AltoCloud Agent	_		
Select all Select non	e		

 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.)

Restrict Genesys Cloud Embedding is dis	abled			
If Restrict Genesys Cloud Embedding is a allowed to embed the Genesys Cloud fra (Enter multiple domains as a comma-se	mework.	our Salesforce dom	nain(s) below. The d	omain(s) will be
Domain(s)				×
	Back	Next		

**Note:** For information about Genesys Cloud Embedding, see <u>https://help.my</u>purecloud.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**.

Start	EULA	Permissions	Review and Install
Review			
We will do the following in your (	Genesys Cloud org:		
1. Assign the OneView permission	ns, integration>oneView>a	agent, to the roles selected for li	censing.
2. Create an OAuth client, Avtex	OneView_Oauth, for Salesf	orce Omni Channel state synchro	nization.
3. Create a role, Avtex_OneView	Role, with the required per	missions, and assign to the Avte	x OneView Oauth OAuth client.
You will need to check the permi	ssions for agents. Make sure	agents have these minimum pe	rmissions assigned, in order to fully utilize OneV
Conversation > Call			
Ability to handle calls			
Conversation > Conference			
Ability to handle conference	5		
Conversation > Callback > Create			
Ability to add and schedule (	callbacks		
Conversation > Email > Accept			
Ability to accept an email			
Conversation > Message > Accept	pt		
Ability to accept a message			
Conversation > Web Chat > Acce	spt		
Ability to accept a web chat			
ExternalContacts > Contact > Vie			
Ability to view external conta	acts for phonebook search		
Outbound > Contact > Edit			
Ability to edit contact Outbound > Contact > View			
Ability to view contact			
Outbound > DNC > Add			
Ability to add DNC			
Recording > Recording > View			
Ability to view past chat con			
Responses > Library > View			
Ability to view canned respo	nses		
Routing > Queue > On Queue			
Ability to go on-queue			
Routing > Queue > Search			
Ability to search for brief qu	eue information		
Routing > Queue > View			
Ability to view queues and q			
Routing > Whap-up Code > View Ability to view wrap up code			

- 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.

avtex>
OneView
Download the OneView documentation with the following links.
Admin Guide 🔀 Agent Guide 🗹 Release Notes 🗹
Download the Call Center template .xml file and install the Salesforce package with the following links. You will need to import the Call Center template in your Salesforce org.
Oneview Salesforce Package
OneView Salesforce package for sandbox
Call Center template
Show Previous Versions 🗮
TTEC Digital OneView End User Agreement

### 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* 

	Install OneView By TTEC Digital	W	
	Install for Admins Only	Install for All Users	Install for Specific Profiles
You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.			
	I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.     Install     Cancel		

**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 <a href="https://help.salesforce.com/articleView?id=sf.distribution\_installing\_packages.htm">https://help.salesforce.com/articleView?id=sf.distribution\_installing\_packages.htm</a>.

# 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.

SETUP Permission	ets
Permission Set OneView Admin	
Q Find Settings	Manage Assignments

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

	> SETUP > PERMISSION SET 'ONEVIEW ADMIN' OneView Admin						
$ \geq $					$\langle \langle \cdot \rangle \rangle$		1 / 1 / / /
с	urrent Assignments						Add Assignment
	Full Name ↑ 🛛 🗸	Active	Role 🗸	Profile $\lor$	User License 🗸 🗸	Expires On	~
	Admin User	$\checkmark$		System Administrator	Salesforce		

- 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.

		2	Import	
Action	Name 🛧	Version	Created Date	Last Modified Date
Edit   Del	<u>CIMplicity</u>		5/19/2020 5:11 PM	10/15/2020 3:02 PM

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

	Import Cancel
New Call Center Import Information	
Call Center Definition File	Choose File OneViewCallCenter.xml
	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:

Call Center Edit			Save Cancel
General Info			
	Internal Name	OneViewCallCenter	
	Display Name	OneView Call Center	
	Description	OneView Call Center	
	CTI Connector Progld	MyAdapter.MyAdapter.1	
	Version	0.1	
	Adapter URL	Phone?region=us-east-1&d	
	Use Api	true	
5	alesforce Compatibility Mode	Classic_and_Lightning	
	Heigh	530	
	Width	305	
			Save Cancel

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 <u>https://help.my-purecloud.com/articles/about-single-sign-on-sso/</u>.

**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 <u>https://help.my-purecloud.com/articles/configure-call-center-settings/</u>

- 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 <u>https://help.-salesforce.com/articleView?id=cti\_admin\_manageagentsadd.htm</u>.

### 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
- o <u>https://help.salesforce.com/articleView?id=sf.service\_presence\_create\_presence\_status.htm</u>

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

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

etup	Home	Object Manager	$\sim$		
^			( )		
Q One 🛛 😵					
Items					
<b>One</b> View - Settings					
I			-		
r	ne w - Settings	ne w - Settings	w - Settings		

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

Oneview - Settings	
Call Center	Select a Call Center to get started
Select a Call Cente 🔻	
OneView Call Center	
OneView Development	
OneView Staging Call C	

### 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.

✿ OneView - Settings		
Call Center OneView Staging Call ▼ Second Second Sec	General Options  Allow Workspace Transfers  Disable Alert Panel	Save

#### **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

ioi each now 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".

I take at the status area at a	fields the stars is a		fields of the stady we sound
Listed below are the	fields that can be	mapped onto	fields of the task record.

Name	Туре
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:

Task Fields		Genesys Cloud Attributes		Ad
Call Object Identifier	▼	Conversation Id	•	Rem
Description	Ŧ	Wrapup Notes	T	Rem
Call Result	Ŧ	Wrapup Name	¥	Rem
Call Type	¥	Direction	•	Rem
Call Duration		Duration Seconds	•	Rem

#### 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.

🌜 Phone	_
Accept	Reject
Queue Name Gus	
From	
Queue Name Gus	
Provider PureCloud Email	

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.

oneView - Settings				
Call Center	<b>Voice</b> Email Web Message Cl	hat Callback		
OneView Staging Call 🔻				
😴 Flow Triggers	Enter Participant Data Label		Enter Participant Data	ſ
≚ Task Logging	Interaction Data selected here will be	displayed to the ap	gent when a new interaction comes in.	
Minteraction Details	Select Interaction Details for Voice Available		Selected	
Client Credentials	Address	^ <b>&gt;</b>	From 🔒	
Requires Credentials	Ani		Queue Name 🔒	
General State Synchronization	Connected Time	•	Interaction Id	•
Outbound Campaigns	Direction			
	Display Address			
	Display Name	-		
		Save Vo	ice 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.

Genesys Cloud C	onfiguration
New OAuth Cred	entials
Region	North America (East)
Client Id	2010/02/02 00:07 07:00000
Client Secret	
	Save Cancel

### 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
	Select a default ready state for each system.
Ready States	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.
	Select a default not ready state for each system.
Default Not-Ready States	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.
Interacting States	These states are used when the agent is handling an interaction.
	If required, add additional custom state mappings.
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 <a href="https://help.salesforce.com/articleView?id=sf.dev\_apps\_lightning\_create.htm">https://help.salesforce.com/articleView?id=sf.dev\_apps\_lightning\_create.htm</a>.

- 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.

SETUP         New Lightning App         N           Lightning Experience App Manager         N         N							ed App
. iter	ms • Sorted by App Name • Filtered I	by All appmenuitems - TabSet T	ype				₽
	App Name 🕈 🛛 🗸	Developer Name 🗸 🗸	Description	✓ Last Modified D	) 🗸 Арр Туре	✓ Vi ✓	
81	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	3/21/2018 12:	52 P Lightning	~	Ŧ
32	Sales	Sales	The world's most popular sales force automation (SFA) solution	5/1/2018 3:12	PM Classic		▼
33	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	4/20/2021 10:	29 A Lightning	~	
33 34	Sales Console Salesforce Chatter	LightningSalesConsole Chatter	(Lightning Experience) Lets sales reps work with multiple records on one screen The Salesforce Chatter social network, including profiles and feeds	4/20/2021 10: 5/1/2018 3:12		Edit	•

- 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.

Add Utility Item	Utility Bar Alignment 🕦 Default 💌
Q Search	that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.
Notes	
J Omni-Channel	
C Open CTI Softphone	
Quip Associated Documents	-
Quip Notifications	
Recent Items	
🔀 Report Chart	
📑 Rich Text	
Tableau CRM Dashboard	
Visualforce	
—	
✓ Custom (9)	To enable the utility bar for this app, add a utility item.

- 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*.

Add Utility Item	Utility Bar Alignment Default
📞 Phone	PROPERTIES    PROPERTIES
	V Utility Item Properties
	*Label Coneview
	Icon C
	Panel Width
	340 Panel Height
	480
	Start automatically

- 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.

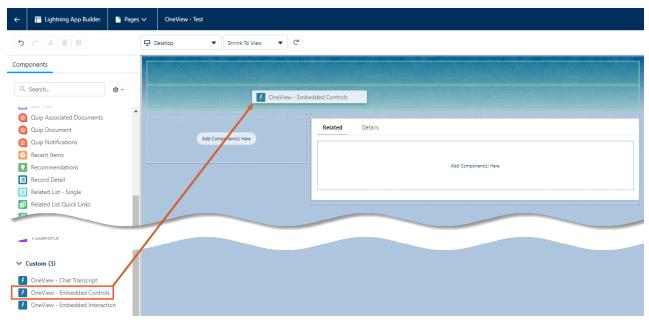
#### Notes:

• 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 <u>https://help.salesforce.com/articleView?id=sf.lightning\_page\_overview.htm</u>.

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

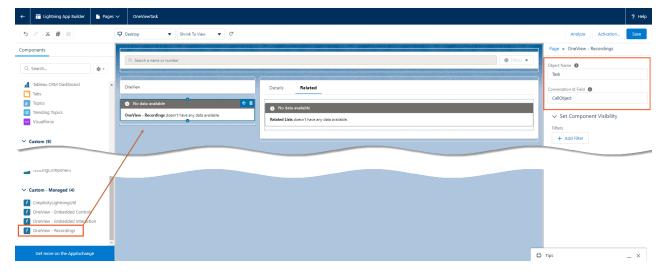


3. Locate the **OneView - Embedded Interaction** component (in the Custom section) and drag it to the desired location on the page.

÷	🧰 Lightning App Builder	🕒 Pages 🗸	OneView - Test
5	C X 🗊 📋	₽ 0	Desktop   Shrink To View   C
Com	ponents		Q. Search a name or number
Q	Search	¢ -	
	Quip Associated Documents	-	Related Details
8	Quip Document Quip Notifications		
0			Add Componentia) Here
2	Recommendations Record Detail		
	n Single	1	
$\sim$	Custom (3)		
4	OneView - Chat Transcript OneView - Embedded Controls		
y y		_	

- 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.

**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 <u>https://help.mypurecloud.com/articles/architect-default-variables/</u>.

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

For more information, see:

- Genesys Cloud Architect: <a href="https://help.mypurecloud.com/articles/architect-overview/">https://help.mypurecloud.com/articles/architect-overview/</a>
- Salesforce Softphone Layout: <u>https://help.salesforce.com/articleView?id=sf.cti\_admin\_phonelay-outs.htm</u>

#### **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:

▼ 1 Attribute	۲
Attribute Name 1 ()	
oneView_screenpopTarget	∎ ◄
Value To Assign 1	
Replace(Call. <u>Ani</u> , "tel:+", "")	∎ ◄

**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.

Softphone Layout	Help about this section 🧿
Display these call-related fields:	
Caller ID, Dialed Number	Edit
Display these salesforce.com objects:	
Account, Contact, Lead	Add / Remove Objects
If single Account found, display: Account Name If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.	Edit
If single Contact found, display: Name If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.	Edit
If single Lead found, display: Name If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.	Edit
Screen Pop Settings	Help about this section 🧿
Screen pops open within: Existing browser window	Edit
No matching records: Pop to new Contact	Edit
Single-matching record: Pop detail page	Edit
Multiple-matching records: Pop to search page	Edit

6. Click **Save** to return to the Softphone Layouts listing.

#### 7. Click Softphone Layout Assignment.

8. Add the layout to the appropriate profiles. See <u>https://help.salesforce.com/articleView?id=sf.cti\_admin\_phonelayoutsassign.htm</u>

**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:

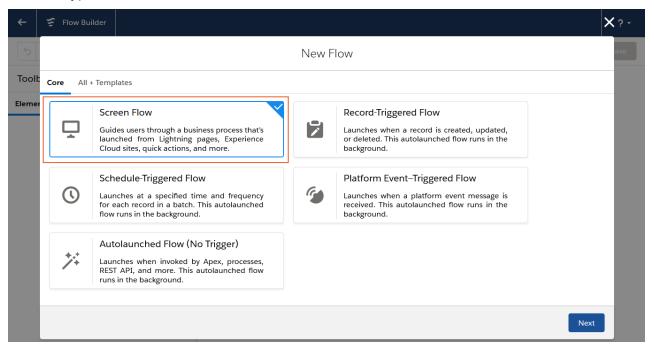
- <u>https://help.salesforce.com/articleView?id=sf.flow.htm</u>
- <a href="https://help.salesforce.com/articleView?id=sf.flow\_concepts\_building\_blocks.htm">https://help.salesforce.com/articleView?id=sf.flow\_concepts\_building\_blocks.htm</a>
- https://trailhead.salesforce.com/en/content/learn/trails/build-flows-with-flow-builder

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:



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.

Edit Variable				
at	conversationId * Data Type  Text Default Value	Allow multiple values (collection) (	D	
	Enter value or search resources  Availability Outside the Flow  Available for input  Available for output			Q
		Ca	ancel	Done

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

#### 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	Туре	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.
		System defined string indicating what caused the com- munication to disconnect.
disconnectType	String	Valid values: endpoint, client, system, timeout, transfer, transfer.conference, transfer.consult, transfer.forward, trans- fer.noanswer, transfer.notavailable, transport.failure, error, peer, other, spam, uncallable.

Name	Туре	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 <i>Locating an Id to use in a flow</i> .
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.
peerld	String	The id of the peer communication corresponding to a matching leg for this call.
provider	String	The source provider for the call.
queueld	String	The queue id of the acd participant. See <i>Locating an Id to use in a flow</i> .
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.
userld	String	The unique identifier for the user. See <i>Locating an Id to use in a flow</i> .
userQueueld	String	The queue id that the call came in on for the user participant.
wrapupCode	String	The user configured wrap up code id. See <i>Locating an Id to use in a flow</i> .
wrapupDurationSeconds	Integer	The length of time in seconds that the agent spent doing after call work.

Name	Туре	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.

<sup>1</sup> isConference: when the "maxparticipants" property is set on the conversation object.

<sup>2</sup> isInternal: when there is no participant of purpose, "customer" or "external", on the conversation.

<sup>3</sup> 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.

37

## 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.

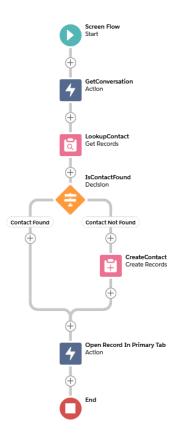
## Inputs

- 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.

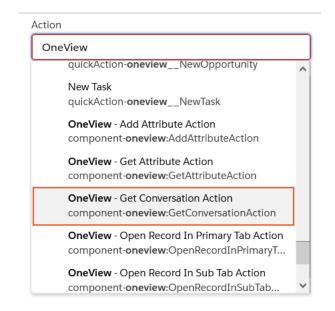
## 4.1.3 Example Salesforce Flows

## 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.

- 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				
	Condition Require- ments	All Conditions Are Met				
Filter Account Records	Field	Select Phone				
Filler Account Records	Operator	Contains				
	Value	SelectOutputs from GetConversation > displayAdress				
Sort Contact Records	Sort Order	Ascending				
	How many Records to Store	Only the first record				
Storing Records	How to Store Record Data	Choose fields and assign variables				
	Where to Store Field Values	In separate variables				
Select Variables to Store	Field	Id				
Contact Fields	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		
	How many Records to Create	One		
Create and Set the Records	How to Set the Record Fields	Dne Jse separate resources, and lit- eral values Contact Phone Select Outputs from GetCon- versation > dis-		
Create a Record of This Object	Object	Contact		
	Field	Phone		
Set Field values for the Genesys Cloud Routing Request	Value	SelectOutputs from GetCon- versation > dis- playAddress		

- 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

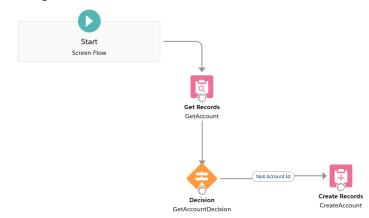
1. Navigate to Flow Builder, and select Toggle toolbox.

## 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			
	Condition Requirements	All Conditions Are Met			
Filter Account Records	Field	Phone (Account Phone)			
	Operator	Contains			
	Sort Order Not Sorted	displayAddress			
Sort Account Records	Sort Order	Not Sorted			
	How many Records to Store	Not Sorted         Only the first record         Choose fields and assign			
Storing Records	How to Store Record Data	Choose fields and assign variables			
	Where to Store Field Values	In separate variables			
	Field	ld			
Select Variables to Store	Variable	accountId			
Account Fields	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.

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.
- 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*.
  - a. Enter a Laber and Ar Hvame for this now action. For example, gereack robits and
  - 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	SelectOutputs 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	SelectOutputs from getClickToDialAttribute > attributeValue
Whold	SelectOutputs from getRecordId > attributeValue

- d. Click Done.
- 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 cre- ateTaskRecord 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.

Flows									New	/ Flow
low Definitions	NGEOGEN OMBAN		(, <sup>2</sup> (()	( <u>121)</u> (	JIII AMANA A	\\(,==*'(	07	zer Oillean (		\ ( ,=='
All Flows		te d C h aver a ma						<u>छ</u> े -	G	
Flow Label 1	Filtered by All flow definitions • Upda	Proces V	A ∨	Te ∨	Package State 🗸	P V	Last	LIST VIEW CONTROLS		
Create a Case	Create Case	Screen Flow	A V	√	Managed-Installed	P V	Last	New	~	
OneView - Complete	Complete	Screen Flow	Image: A start of the start		Unmanaged		Usei	Clone		
OneView - Create Call Log	CreateCallLog	Screen Flow	<b>~</b>		Unmanaged		Usei	Rename		
OneView - Disconnect	Disconnect	Screen Flow	Image: A start of the start		Unmanaged		Usei			
OneView - Get Or Create A	GetOrCreateAccount	Screen Flow	Image: A start of the start		Unmanaged		Usei	Sharing Settings		
OneView - Inbound	Inbound	Screen Flow	<b>~</b>		Unmanaged		Usei	Edit List Filters		
OneView - Init Outbound	InitOutbound	Screen Flow	Image: A start of the start		Unmanaged		Use	Select Fields to Display		
OneViewDemo - Get Or Cr	OneViewDemo_GetOrCreate	Screen Flow	<b>~</b>		Unmanaged		Usei	Delete		•
OneViewDemo - Get Or Cr	OneViewDemo_GetOrCreate	Screen Flow			Unmanaged		Usei			
OneViewDemo - Get Or Cr	OneViewDemo GetOrCreate	Screen Flow	_	_	Unmanaged			Us 2021-02-19, 1:03		

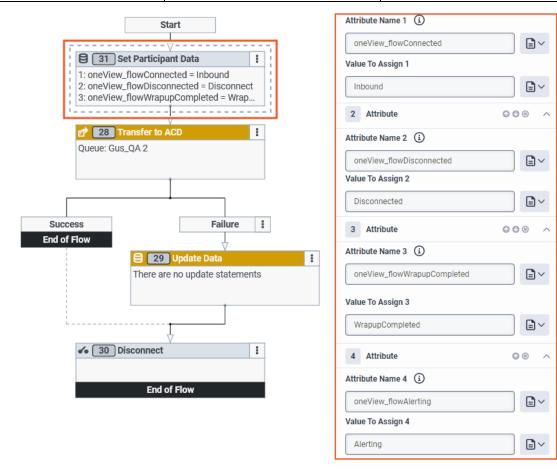
## 4.2.1 Trigger flows via participant data

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 <u>https://help.my-purecloud.com/articles/architect-overview/</u>.

- 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 Alert- ing Flow	Triggered when a inbound con- versation is alerted.
oneView_flowConnected	onnected API Name of your Salesforce Triggered when a ca	
oneView_flowDisconnected	API Name of your Salesforce On Disconnected Flow	Triggered when a conversation is dis- connected/ rejected.
analian flowComplete	API Name of your Salesforce On	Triggered when ACW is completed on a conversation.
oneView_flowComplete	Complete Flow	<b>Note:</b> 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	В	С	
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 <a href="https://help.mypurecloud.com/articles/create-new-contact-list/">https://help.mypurecloud.com/articles/create-new-contact-list/</a>.

# 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

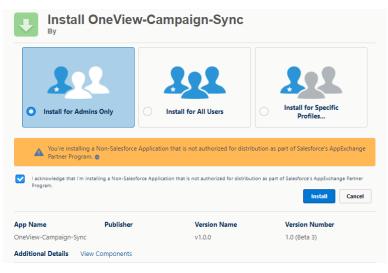
URL: https://login.salesforce.com/packaging/installPackage.apexp?p0=04tOG000000IMjYAM

## 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.

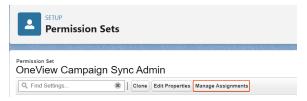
Integrations / OAuth / Avtex_OneView_Oauth							
Integrations	Client Details Roles						
Actions							
OAuth	Name	Туре	Description	Divisions	Assigned		
Authorized Applications	Avtex_OneView_Role	Custom	OneView role with necessary permissions for API access.	Home 📝			
	Outbound Admin	Standard	Administrator for outbound dialing	Home 📝			

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.

SETUP > OBJECT MANAGER Campaign		11/2010					
Details	Buttons, Links, and Actions 13 Items, Sorted by Label				Q, Quick Find	New Action	New Button or Link
Fields & Relationships	LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN	<u>^</u>
Page Layouts							•
Lightning Record Pages							
Buttons, Links, and Actions							•

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

nter Action Information	Save Cancel
Object Name	Campaign
Namespace Prefix	oneview
Action Type	Lightning Component
Lightning Component	oneview:RefreshStatsAura 🗸 👔
Height	250px
Standard Label Type	None 🗸 i
Label	Refresh Stats
Name	Refresh_Stats
Description	1
leon	4 Change Icon

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 <a href="https://help.mypurecloud.com/articles/dialing-modes/">https://help.mypurecloud.com/articles/dialing-modes/</a>

* Settings Name		Division	
Doctest		Q	
Dialing Mode Options			
Dialing Mode		*Queue	
External Calling	•	Q Gus_QA 1	C
Agent Script			
Q Default Inbound Script	$\otimes$	Allow Skipping of Preview Calls	
Campaign Options			
DNC Lists		Contactable Time Set	
Q		Q	

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

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

**OneView Outbound Campaign Settings** 

Advanced		
Priority	Connected Flow	
	Q. OneView - Inbound	$\otimes$
Disconnected Flow	Completed Flow	
Q	Q	
Always Running		

**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.

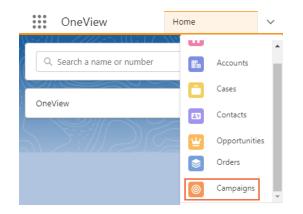
Result: A new Outbound Settings record is created.

## 5.3 Create a new Salesforce outbound campaign

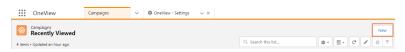
To create a new campaign:

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.

ew Campaign			
Campaign Owner		Status	
User User		Planned	
* Campaign Name		Last Campaign Sync Result	
Doctest			
Active		Last Contact List Sync Result	
Last Campaign Sync Time		Last Contact List Sync Time	
Date Time		Date Time	
苗	O	苗	0
Progress		Synchronize Campaign	
Туре		Progress (%)	
Advertisement	•		
Parent Campaign		*OneView Outbound Campaign Settings	
Search Campaigns	Q	Doctest	×
Description			
Can	ncel Sa	ve & New Save	

#### 4. Click Save.

*Result*: A new Salesforce campaign is created.

Type Advertisement	Status Planned	Start Date	End Date	
Related	Details	So 7/2//\\	2:11.	
Campaign Owner				Status
User User				Planned
Campaign Name				Last Campaign Sync Result
Doctest				
Active				Last Contact List Sync Result
Last Campaign Sync 1	lime			Last Contact List Sync Time
Progress				Synchronize Campaign
				✓
Туре				Progress (%)
Advertisement				
Parent Campaign				OneView Outbound Campaign Settings
				Doctest

## 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.

Campaign Doctest	
Related Details	
Campaign Hierarchy (0)	
O Campaign Members	Add Leads Add Contacts 👻

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

	Add Contacts to Campaign									
💷 Tes	Testacc ×									
2 items se	elected									
-	Name 🗸	Account Name $\checkmark$	Phone	$\sim$	Email 🗸 🗸	Contact Owner Alias $\sim$				
~	Testacc	Test Account				UUser				
~	Testnew Doc	Test Account				UUser				
+	Test	Test Account				UUser				
						Cancel Next				

#### 3. Click **Submit**.

Add to Campaign		
1 Contact Selected		
* Campaign		
Octest		×
To remove the selected record, press Backspace or Del.		
*Member Status		
Sent		•
Update existing campaign members?		
Keep member status		
<ul> <li>Overwrite member status</li> </ul>		
	Cancel	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.

iype Advertisement	Status Planned	Start Date 2023-06-27	End Date 2023-06-28	
Related	Details			
o Campaign	Hierarchy (0)			
Attachmer	nts (0)			Upload Fi

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

Car	mp		Doctest n Members							[	Add Leads	Add Contacts	Update Status	Remove	Manage Camp	aign Members 👻
		-	Туре	$\sim$	Status	~	Name	~	Title	~	First Name	~	Last Name	$\sim$	Company	$\sim$
1		<b>~</b>	Contact		Sent		Testacc						Testacc		Test Account	-
2			Contact		Sent		Testnew Doc				Testnew		Doc		Test Account	

#### 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.

Related	Details		
Campaign Owner User User		Status Planned	
Campaign Name Doc_test		Last Campaign Sync Result Successful	, de la
Active		Last Contact List Sync Result Successful	
Last Campaign Syno 2023-06-26, 4:21		Last Contact List Sync Time 2023-06-26, 4:12 p.m.	
Type Advertisement		Synchronize Campaign	
Parent Campaign		OneView Outbound Campaign Settings	

• **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.

Campaign Owner		Status		
User User		Planned		
Campaign Name		Last Campaign Sync Result		
Doc_test		Successful		
Active		Last Contact List Sync Result		
Image: A start of the start		Successful		
Last Campaign Sync Time		Last Contact List Sync Time		
2023-06-26, 4:47 p.m.		2023-06-26, 4:12 p.m.		
Progress		Synchronize Campaign		
1/1		Image: A start of the start		
Туре		Progress (%)		
Advertisement	1	100%		

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

Campaign N Doc_test				
st Name	Last Name Test	Status Sent	Company (Account) Test Account	
Campaign				
Doc_test				
Contact				
Test				
Lead				
Status				
Sent				
Responded				Genesys Cloud Result
				ININ-OUTBOUND-INVALID-PHONE-NUMBER
				Result Retrieved
				2023-06-26, 4:46 p.m.

## 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.

2023-06-29 🗰 EST 💌	2023-06-29			
	2023 00 23	i	EST	•
	End Date			
2023-06-30	2023-06-30	苗		

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 auto-matically 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 <u>https://help.mypurecloud.com/articles/about-acd-email-routing/</u>

# 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 Queueld 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.

Information					
mormation					
Routing Options Name a				/	
Queue Name				/	
Call Center Id 0	-			/	
Queue Id 61				/	
Inbound Email Flow				1	
Languageld				/	
Skills				/	
Created By					Last Modified
	Cancel	Save & New	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	
	Condition Requirements	All Conditions Are Met	
Filter Case Records	Field	Id	
Filler Case Records	Operator	Equals	
	Value	Record Id	
Sort Account Records	Sort Order	Not Sorted	
	How many Records to Store	Only the first record	
Storing Records	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	
	How many Records to Create	One	
Create and Set the Records	How to Set the Record Fields	Use separate resources, and lit- eral values	
Create a Record of This Object	Object	Genesys Cloud Routing Request	
Set Field values for the Genesys	Field	RoutingOptions	
Cloud Routing Request	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.

C Phone Reject	-
Queue Name Gus_QA 1	
From al.com	
Provider Oneview for Salesforce	
Queue Name Gus_QA 1	
OneView (On Queue)	

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

OneView - Settings	~ ×	00001014	× ×		
Related					
Emails (1)					
Subject		From Address	To Address	Message Date	
test email		@ttecdigital.c	@ttecdigital.c	2023-04-06, 11:04 a.m.	
			View All		

- 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.

origin 'https://oneview.avtexcloud.com' has been blocked by CORS policy: 'No Access-Control-Allow-Origin' header is present on the requested resource \_\_<u>VM5638:1</u>

# 7.2 Embedded phone not connecting

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

S Phone		s Contact.
av	tex)	
		8
	2	unt
		@gmail.com
Chatter Feed 4	Recent Items 😰 I	Notes 4 Mogli Notifications C Phone

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

# 7.3 Flow errors

For information on Flow Error Handling, see <u>https://appex</u>change.salesforce.com/appxListingDetail?listingId=a0N3A00000FMhi0UAD.

## Here are some helpful tips:

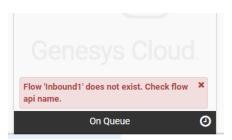
- Observe the Flow and Process Error emails if your Flow is not performing as expected. To setup process error emails, see <u>https://help.salesforce.com/articleView?id=sf.flow\_troubleshoot\_error\_</u> <u>email.htm</u>.
- 2. Observe the browser Developer Tools logs for OneView actions. For information on accessing browser logs in Chrome, see <u>https://developers.google.com/web/tools/chrome-devtools/-console/log</u>.

For example:

Console Search	ch de la constance de la const	×
⊗ top	V 🕑   Filter Default levels V	238 hidden 🔹
= 276 messag	oneview:GetConversationAction invoked with {"conversationId":"60287121-0786-4698-927F-e281aF02212b"}	logger.is:12
€ 268 user me	oneview:GetConversationAction succeeded	logger.js:12
S 5 errors	oneview:GetAttributeAction invoked with {"conversationId":"60287121-9786-4098-927f-e281afb2212b","Key":"myattribute"}	logger.is:12
A 68 warnings	oneview:GetAttributeAction succeeded	logger.js:12
	oneview:OpenRecordInPrimaryTabAction invoked with ("recordId":"001630000029iabAAA","objectType":"Account","active":true}	logger.js:12
165 info	oneview:OpenRecordInPrimaryTabAction succeeded	logger.js:12
38 verbose	<pre>6ET /api/v2/presencedefinitions?pageSize=100</pre>	logger.js:10
	GET /api/v2/users/melexpand+presence	logger.js:10
	GET /api/v2/presencedefinitions?pageSize=100	logger.js:10
	GET /api/v2/users/me/expand=presence	logger.js:10
	POST /api/v2/users/search	logger.jsi10
	GET /api/v2/routing/queues/0ae7f058-65e4-4a22-83dd-05d0aa59890a/wrapupcodes?page5ize×100	logger.js:10
	oneview:AddAttributeAction invoked with ("conversationId":"60287121-9785-4d98-927f-e281afb2212b","key":"relatedToRecordId","value":"(hidden> (non-null)")	logger.js:12
	PATCH /api/v2/conversations/calls/60287121-9786-4498-927f-e281afb2212b/participants/34139b23-753b-4dff-ba2a-b0045f5e3d91/attributes	logger.is:10
	oneview:AddAttributeAction succeeded	loger.is:12
	oneview:FlowRunner - flow 'OneView - Inbound' status changed (FINISHED_SCREEN)	logger.is:12

- 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

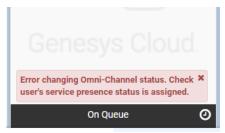
Depending on the amount of content configured on a Salesforce page, drop-down and/or pop-up items such as the directory search, wrap-up code list, or the keypad may be cutoff or appear underneath other Lightning app items.

Select wrap-up code 🛛 🔻		1	2 ABC	3
Billing Issue	_	4	5	6
Other Inquiry		GHE	101	MNO
oun inforty	_	7	8	9
Support		PQRS	TUV	WO(YZ
			0	22

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.

✓ Call Details	
Call Type Inbound	Call Object Identifier b78c79fd-a988-4f5f-9af3-25b4a2602fae
Interaction Name	Queue
Call Duration	Queue Time
00:00:44	00:00:00
Interaction Details Link	Caller Phone
https://apps.mypurecloud.com/directory/#/engage/admin/intera ctions/b78c79fd-a988-4f5f-9af3-25b4a2602fae	
Sentiment_Score	Call Result
	f7ca5b38-26a6-4866-abdd-5131d596bdef
	After Work Duration
	00:00:00
Call Recording	Transcript
Recording is not available	

# 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.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
ninstall	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 us	ers together in a sin	gle workforce mana	igement system. W	/ith a				
Ininstall	MoneView	Aria Solutions	3.4	oneview	5/14/2021 1:14 PM	~	0	1	3	Not Passed
ninstall	A Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	4/20/2016 2:49 PM	~	0	0	0	Not Passed
ninstall	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

## 8.2 Upgrade the package

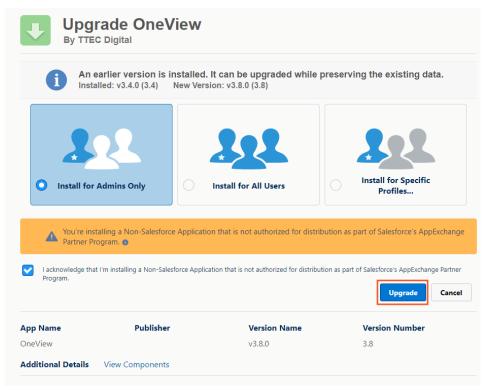
1. In Genesys Cloud, go to Apps > OneView for Salesforce.

00	Activity	Directory 🝷	Documents	Performance 🔻	Reports	Apps 🔻	Admin		٩	Off	Queue	
	≡ Pee	ople & Permissions	/ Roles / Permis	sions		OneView fo	r Salesforce					-

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

avtex					
OneView					
Download the OneView documentation with the following links.					
Admin Guide 🔀 Agent Guide 🔀 Release Notes 🔀					
Download the Call Center template .xml file and install the Salesforce package with the following links. You will need to import the Call Center template in your Salesforce org.					
Oneview Salesforce Package					
OneView Salesforce package for sandbox 🔀					
Call Center template					
Show Previous Versions 🗮					

- 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.

	setup Tabs		
Lightning	l Page Tabs	New What Is This?	
Action	Label	Tab Style	Description
Edit   Del	OneView - Settings	🄯 Gears	Created by Lightning App Builder
Edit	OneView - Settings	Gears	Created by Lightning App Builder
Edit	Workforce Monitor Configuration Page	TV Widescreen	Created by Lightning App Builder

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

Edit Lightning Page Custom Tab OneView - Settings (Managed)

Fill in the fields below to define the Lightning Page custom tab.

Main This Custom Tab Definition has been removed from the managed package. You can delete the component if no longer needed.				
Custom Tab Definition Edit				
Lightning Page Custom Tab Information				
Tab Label	OneView - Settings			
Tab Name	SettingsTab i			
Namespace Prefix	oneview			
Content	OneView - Settings (deprecated)			
Tab Style	🍜 Gears 🔍			
Enter a short description.				
Description	Created by Lightning App Builder			
	Save			

*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				
	Genesys Cloud Campaign Status				
	Contact List Id				
	Genesys Cloud Campaign Schedule				
	Campaign Id				
	Last Campaign Sync Result				
	Last Campaign Sync Time				
Campaign	Last Contact List Sync Result				
	Last Contact List Sync Time				
	OneView Outbound Campaign Settings				
	Progress				
	Progress (%)				
	Synchronize Campaign				
	Genesys Cloud Time Zone				
	Genesys Cloud Result				
Campaign Member	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 1	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	~	<u>User, Admin</u>	2/26/2021 4:26 PM	<u>User, Admin</u>	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 📥	GcEulrelandApi	oneview	https://api.mypurecloud.ie	~	User, Admin	2/26/2021 4:26 PM	User, Admin	2/26/2021 4:26 PM
Edit   Del 📥	GcEulrelandAuth	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.

Remote Site Edit	Save Save & New Cancel
Remote Site Name	GcAustraliaNewZealandApi
Remote Site URL	https://api.mypurecloud.com.au
Disable Protocol Security	i
Description	j.
Active	
	Save Save & New Cancel

- 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.

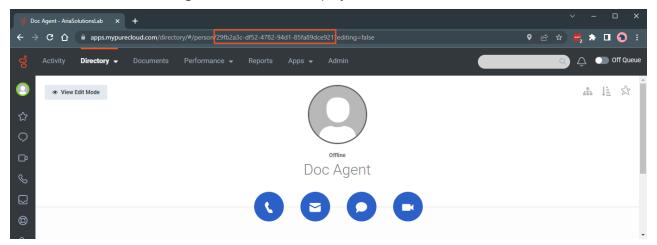
Name	Description
number	Provides the phone number clicked by the user.
recordId	Provides the ID of the record associated with the clicked phone number.
recordName	Provides the name of the record for the clicked phone number.
objectType	Provides the type of record associated with the clicked phone number.
accountld or contactld	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 <i>person accounts</i> 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 queueld

- 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 queueld is displayed.

g Queues Activity		× +												o x
÷ → C ☆	🗎 apps.m	nypureclou	i <b>d.com</b> /d	irectory/#	#/analytic	s/queues/a652ed08	-5b53-4d4e-8e7c-	ecd64af52019/acti	vity?tabld=			9 @ ☆	🛃 🄅 C	I 🕤 I
o Activity				ts Pe	erforman	ce 🗕 Reports	s Apps <del>-</del>	Admin				Q	¢ ◯	Off Queue
Queue Activity	Detail ;	+												
Activity	Performa	nce Inte	ractions	Agent	s									
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Waiting	In	teracting		Alerting	3		On Queue	Off Queue						•
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Ø					0	waiting interactions	Filter user(s)		2			1 - 11 of 11 active agents	2 inactive a	gents
Waiting		Durati	▲ Skill	s		Routina	🕀 Agent 🔻		Time	in Status 🛊	Skills	Duration	Me	edia Typ 👻

## 9.5.3 wrapupld

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

🔹 Wrap-Up 🛛 🗙 🕂							v - 0	×
← → C ☆ 🏻 apps.mypurecloud.com/directory/#/analytics/w	rapup/performance?end=2022-05-18T06%3A00	%3A00.000Z8(start=2022-0	5-17T06%3A00%3A00.000Zi	ktabld=1			🔹 🕈 🖻 🛧 🖻 🕻	) :
Sectivity Directory - Documents Performance	🔹 Reports Apps 👻 Admin						Q Q 🔾 💽 off	Queue
Wrap-Up Performance : +								4
Wrap-Ups								
		÷	May 17, 2022 🔸				3 ≌ ₹	5
	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Handle	Hold	% Total Talk Time	
$\Diamond$	2m 37s	1m 45s	2m 31s	45s	59	12	N/A	
	7m 19s		-					
Tue 17 C Add to filters Deselect all Selected Rows: 1	06:00 AM		12:00 PM	•	06:00 PM		Wed 18	
B Wrap-Up -	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Handle	Hold	% Total Talk Time	+
Address Changed	21s	7s			1		0%	
🔗 🎛 Billing Issue	2m 53s	1m 47s	3m 28s	20s	27	7	47%	
Cancelled Appointment	5s	3s	-	2s	1	-	0%	
ININ-WRAP-UP-TIMEOUT	4m 8s	2m 9s	1m 39s	1m 39s	10	3	20%	
Other Inquiry	15s	3s	-	-	1		0%	
🕀 🗋 None	1m 48s	1m 46s	<b>29</b> s		19	2	33%	
								- 1

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

Wrap-Up								
→ C 🏠 🔒 apps.m	/purecloud.com/directory/#/analytics/wr	apup/performance?end=2022-05-18T06%3A009	63A00.000Z&start=2022-09	5-17T06%3A00%3A00.000Zi	&tabld=1&wrapUp=9cdcc48	i7-7cf6-4aee-b815-0b10df6	bbcac	오 순 ☆ 🗮 🛊 🛛 😪
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Wrap-Up Performance	+							
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q	155	7m 47s						
O Tue 17	• •	06:00 AM		12:00 PM	÷	06:00 PM		Wed 18
Wrap-up: Billing Is	sue 🗴 Clear All							
Wrap-up: Billing Is	sue 🔉 Clear All	Avg Handle	Avg Talk	Avg Hold	Avg ACW	Handle	Hold	% Total Talk Time

## 9.5.4 externalContactId

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

00	Activity Directory - Docu	ents Performance 🗸 Reports Apps 🗸 Admin	Q 🔔 🕥 Off Queue
0	/ External Contacts / McGyve	Angus Reid	
\$	AM	Interactions	Edit Contact
С С	McGyver, Angus Reid Problem Solver	Last 30 Days Apr 17, 2022 - May 17, 2022	
S	<ul> <li>499 Ductape Ln</li> <li>Los Angeles, CA 90210</li> <li>US</li> </ul>	No interactions	
Q	政 View on map <b>Work</b> +1 602-668-8576	Notes No notes	+ Add Note
ඟී දැ	Mobile +1 312-503-4693 Home +1 312-367-8406 Other +1 312-555-8400		

## 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**.

Query Grid	: Save Row	Insert Row	Delete Row	Refresh Grid				
Logs	Tests C	heckpoints	Query Editor	View State	Progress	Problems		
select	select <u>oneview_CallCenterId_</u> c from <u>oneview_Configuration_c</u>							
Any query errors will appear here								
Execute	Execute Use Tooling API							

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 <i>Alerting flow</i> 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 <i>Install OneView for Salesforce integration</i> section with new EULA page and Genesys Cloud permissions. Added <i>Remove the old settings page</i> 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: <i>Disconnect Action, Transfer Action and Wrapup Action</i> . Updated Admin and Agent permission sets in Configure OneView			
Caratarah an 15, 2022	2.12	section.			
September 15, 2022					
	3.11	Added <i>Task Logging</i> to <i>Configure OneView settings</i> . Added new OneView custom action: <i>Wait For Login Action</i> .			
August 23, 2022	5.11	Added new Oneview custom action. <i>Walt For Login Action.</i> 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 <i>Configure OneView</i> > <i>Edit Salesforce profiles</i> .			
May 4, 2022	3.8	Added support for triggering flows via outbound calling lists.			
March 3, 2022 3.		<ul> <li>Added support for callback interactions.</li> <li>Updated <i>Verify Genesys Cloud agent permissions</i> with callback permission.</li> <li>Added outputs to support callback interactions to <i>Get a Genesys Cloud conversation</i> section.</li> <li>Updated <i>Import and edit call center settings</i> with optional SSO window configuration.</li> </ul>			
		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: <i>Open Flow in Primary Tab.</i> Added <i>Upgrade process</i> .
April 26, 2021	1.0	Creation of document.