OneView for Salesforce
Requirements Guide

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Contents

1 Prerequisites

1.1 Genesys Cloud

- An established Genesys Cloud environment using Genesys Cloud voice, chat, email, and/or web messaging.

  Note: OneView only supports Genesys Cloud Web Chat(v2). For information on deploying web chat (v2), see https://developer.genesys.cloud/commdigital/digital/webchat/widget-version2

- A Genesys Cloud 1, 2, 3, or Communicate license. See https://www.genesys.com/pricing.

For information on how to get started with Genesys Cloud, see https://www.genesys.com/genesys-cloud.

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

1.2 Salesforce

- An established Salesforce environment using Sales or Salesforce Lightning that supports Service Console.

- Supports Salesforce Console app navigation. For more information on console app, see https://help.-salesforce.com/s/articleView?id=sf.console2_standard_nav_vs_console_nav.htm&type=5&language=en_US

  Note: Standard navigation may be used but this limits the scope and features of OneView

- A Salesforce Enterprise license. See https://help.salesforce.com/articleView?id=sf.overview_edition.htm.

For information on how to get started with Salesforce, see https://help.-salesforce.com/articleView?id=basics_welcome_salesforce_users.htm.

1.3 OneView URL to allow

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

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

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.

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

Send Response action (Architect flow)

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

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

Outbound campaigns

OneView supports outbound campaigns from Genesys Cloud.

- Associated agent scripts are accessed via the script icon in the CTI panel.
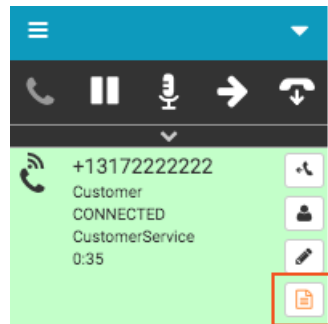
- Salesforce flows can be triggered from an outbound campaign calling list on a per contact basis.

Auto answer

Auto answer configuration from Genesys Cloud is supported in OneView.

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

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

Directory contacts

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

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

Click-to-dial

In OneView, when a click-to-dial number is clicked on a call, the participant data is added.

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

Canned responses

Canned responses configured in Genesys Cloud are used in OneView.

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

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

After interaction work

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

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

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

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

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

4 Supported languages

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

• French

• German

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

Notes:

• Translations within Salesforce tabs and pages are derived from Salesforce.

• Translations within the CTI panel are derived from Genesys Cloud.

5 Salesforce feature allocation

OneView for Salesforce implements the following Salesforce features:

Feature	Count	Description
Custom Objects	2	Storing settings and omni-sync configuration
Custom Tabs	1	Settings page

6 Genesys Cloud API requests

OneView for Salesforce makes API requests to Genesys Cloud for different scenarios:

Scenario	Count
Log into Genesys Cloud with Salesforce page already loaded	38
Refresh Salesforce page while logged in	36
Simple inbound call with wrap-up	11
Simple chat with 2 messages from agent, 2 messages from customer, and wrap-up	26
Longer chat with 10 messages from each participant and wrap-up	36
Searching for a canned response and pasting into chat (chat already established)	8
Entering interaction notes with two pauses in between each entry	7

7 Revision history

Date	Version	Description
April 10, 2023	3.16	Updated *Prerequisites* section.
April 29, 2022	3.8	Added outbound campaigns to *Supported functionality* section.
March 3, 2022	3.6	Added single sign-on to *Supported functionality* section.
December 21, 2021	3.1	Updated the click-to-dial information in *Supported functionality* section.
July 26, 2021	2.0	Updated *Supported functionality* section. Added Genesys Cloud API request count information.
April 26, 2021	1.0	Creation of document.