PureConnect®

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See Change Log for summary of changes.

** GENESYS™**

PureConnect for Salesforce Integration

Administrator's Guide

Abstract

This document describes the setup and configuration of the PureConnect integration with Salesforce.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/pureconnect.

Table of Contents

PureConnect for Salesforce key features

The PureConnect for Salesforce integration is a version of the CIC client with an abbreviated feature set. PureConnect for Salesforce runs inside the Salesforce customer relationship management (CRM) system. There is nothing to install on each user's computer and nothing to maintain or back up on your own servers.

PureConnect for Salesforce provides advanced call controls inside the third-party customer relationship management (CRM) system Salesforce®. PureConnect for Salesforce offers many features including basic call log support, call controls, click-to-dial, screen pop, and more.

Release Documents and Feature Information

- For specific questions, see the PureConnect for Salesforce Integration FAQs.
- PureConnect for Salesforce Release Notes
- PureConnect for Salesforce help
- Salesforce Object Routing Server help
- Salesforce Object Routing Connector help

> **Notice**: The Salesforce Object Routing Connector is being replaced by the Salesforce Object Routing Server. See the Salesforce Object Routing Server section.

Supported interaction types

PureConnect for Salesforce currently supports calls, callbacks, web chats, generic objects, ACD-routed email, and email-to-case interactions. For more functionality, run the CIC client alongside Salesforce.

Customer Interaction Center (CIC)

PureConnect for Salesforce works with an on-premises CIC server and with PureConnect Cloud.

> **Note**: CIC supports several interaction management client applications. This documentation uses the term "CIC client" to refer to these applications, which include Interaction Connect and Interaction Desktop. For more information about CIC clients, see the CIC Client Comparison in the PureConnect Documentation Library.

Salesforce Object Routing Server

The Salesforce Object Routing Server integrates Salesforce with Customer Interaction Center (CIC). The Salesforce Object Routing Server (SORS) is an application developed using Node.js. It communicates with Salesforce using Bayeux protocol and long polling. It replaces the Salesforce Object Routing Connector and eliminates the need for the PureCloud Bridge Server.

> **Notice**: Genesys will not support the PureCloud Bridge Server after January 1, 2021. Customers using the PureCloud Bridge Server with the Salesforce Object Routing Connector should install the new Salesforce Object Routing Server. To use the SORS, customers must be on CIC 2018 R4 or a later release.

The Salesforce Object Routing Server automates the process of routing various CRM (customer relationship management) objects (cases) from your CRM to CIC's ACD engine. The CIC engine intelligently queues these objects based on predetermined criteria. For example, the Salesforce Object Routing Server directs email messages addressed to Support or Sales to the appropriate support or sales queue based on workgroup skills or utilization. For more information see the Salesforce Object Routing Server documentation.

Language support

The integration currently supports the following languages:
- English United States (en-US)
- Japanese (ja)
- Spanish (es)

- French (fr)

The integration determines the language preferences based on the logged on agent's Language setting, set in Salesforce under **My Settings** > **Personal** > **Language & Time Zone.** If a regional preference is not available, the integration falls back to the generic language. If the generic language is not available, it falls back to "en_us" (US English).

The integration determines date and time format based on the browser settings on the computer.

PureConnect for Salesforce architecture

The following diagram shows the architecture for all components of the PureConnect for Salesforce integration.
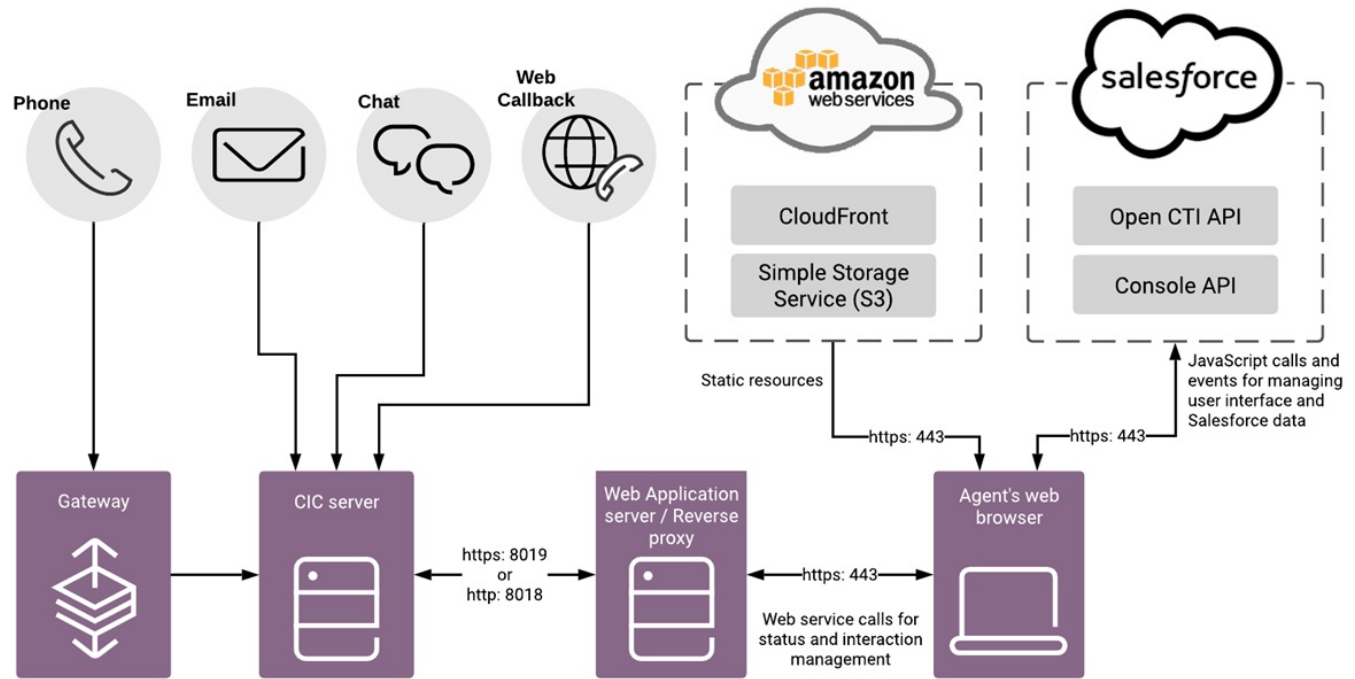
PureConnect for Salesforce(PC4SF) client running within the Salesforce CTI connects to CIC Server using TLS version v1.2.

PureConnect for Salesforce softphone

The softphone appears in Salesforce in one of three forms, depending on your selected view:

- As an **overlay** you can display or hide at will (in Salesforce Lightning Experience).

  Display the softphone by clicking the **Phone** icon in the lower left corner. Use the minimize control to hide the softphone. It can be visible on any page in the Salesforce Lightning Experience.

  > **Note**: If you activate the **Utility Bar: Enable Pop-Out for Custom Utilities** critical update in Salesforce, you can move this overlay. For more information, see https://help.salesforce.com/articleView?id=sforce_api_console_lightning_utility_popout.htm&type=5.

- As a **vertical pane** (in Sales Cloud)

  The vertical pane is static; you cannot move or resize it. A few types of pages in Sales Cloud, such as reports and feed-based page layouts, fill the browser width and temporarily hide the softphone.

- As an **overlay** (in Service Cloud)

  You can move the overlay around the browser window or detach and move it into an entirely new browser tab or window. Because it is an overlay, it is visible on every page in Service Cloud.
  - To access the overlay, click **Phone** in the lower left or right corner of certain Salesforce pages.
  - To detach or reattach the overlay, click the arrow in the upper-right corner of the overlay.

  > **Note**: Access to Service Cloud requires a special license from Salesforce.com. The vertical pane and the overlay have identical functionality.

All three forms have identical functionality.

PureConnect for Salesforce requirements

To run PureConnect for Salesforce, you need:

- An Internet browser: the latest version of Firefox or Chrome, or Microsoft Edge.

  Note: PureConnect for Salesforce no longer supported use of Internet Explorer after the PureConnect 2018 R5 release.

- Salesforce licenses
- PureConnect for Salesforce server license
- Per-user licenses for the Salesforce integration.
  - Salesforce Standard (ACD) User license: full functionality
  - Salesforce Business User (non-ACD) license: limited screen pop functionality

    Pops only interactions that CIC does not route through a CIC workgroup unless agents with a Salesforce Standard User license transferred these interactions.

- PureConnect for Salesforce managed package, available on the Salesforce App Exchange.
- If you are doing content filtering, whitelist the following addresses that PureConnect for Salesforce accesses:
  - https://*.cloudfront.net/crm-web-client-cic/*
  - *hive.genesys.com
  - The URL for the reverse proxy

  Tip: To evaluate the integration's potential load on your site's Session Manager, consider doing an architecture review with a technical contact at Genesys or your partner organization. To arrange for this review, contact your Client Account Manager or Sales Manager.

For CIC premise operations

- A CIC server, version 2015 R2 or later. Interaction Dialer, web chat, callback, and wrap-up features require CIC 2015 R4 or later.

  Note: See the **Known Issues** list on the Product Information page for descriptions of any issues affecting you. Go to https://my.inin.com/products/Pages/Known-Issues.aspx (requires logon). Upgrade to the latest patch of your version whenever possible.

- A web server acting as proxy with SSL enabled. See the CIC Web Applications Installation and Configuration Guide in the PureConnect Documentation Library.
- Per-user licenses for the CIC server.

For PureConnect Cloud operations

- A PureConnect Cloud URL, version 2015 R2 or later. Interaction Dialer, web chat, callback, and wrap-up features require CIC 2015 R4 or later.

First-time setup

To get started with PureConnect for Salesforce, install a managed package and set up a call center in Salesforce. Salesforce automatically pushes subsequent application upgrades. Upgrades don't typically require manual intervention, unless the upgrade requires a new version of the managed package.

Also purchase per-user licenses for CIC; set up and configure a CIC server; and configure Salesforce to display the softphone.

Install or Upgrade the managed package

The managed package contains the call center definition and custom call center settings required to run PureConnect for Salesforce.

1. Download the managed package from the Salesforce AppExchange, either for a production or sandbox environment.
2. On the first step of the installation, select **Install for All Users** or **Install for Specific Profiles**.

   Note: If you click **Install for Admins** only, non-administrators (including agents) may experience degraded performance.

3. Follow the on-screen instructions for installation.

Note: For upgrades, we recommend deleting the old call center definition after assigning existing users to the new call center definition. For more information, see *Access the call center definition*. If you are upgrading from version 2.3 or earlier of the managed package, or aren't sure which version you are on, see *Upgrade from version 2.3 or earlier of the managed package*.

Note: The Salesforce Platform API deprecation does not have any impact on CIC4SF Managed Package version that is available in the Salesforce AppExchange and supports the Summer'23 release. It is important for customers and partners to ensure that they use the latest version available in the Salesforce AppExchange.

Add a PureConnect Call Center Settings tab in Salesforce

The PureConnect Call Center Settings tab allows you to access and edit custom settings related to your call center.

To add the PureConnect Call Center Settings tab:

1. Go to **Setup** and search for **Tabs**.
2. Click **Tabs**.
3. In the Visualforce Tabs section, click **New**.

4. In the Visualforce Page drop-down menu, select **PureConnectCallCenterSettings**.
5. Fill out remaining settings in the wizard according to your Salesforce business practices.

   Steps 2 and 3 in Salesforce let you customize which user profiles and apps see this tab. For more information, see this knowledge article in Salesforce's Help.

Once installed, a tab for the PureConnect Call Center Settings page appears in the top navigation bar in Salesforce.

Set up a call center for PureConnect in Salesforce

To use the integration, set up a Salesforce Call Center and assign values to the Call Center Settings. Then assign users to that call center. Salesforce users cannot use call center features until you have assigned them to a call center.

> **Note**: To configure a call center and assign users, you must have user permissions to manage call centers in Salesforce. For more information about permissions, click the Help link on Salesforce pages during any step in setting up a call center.

To set up a call center, see the following information:

[Access the call center definition](#)

[Manage the call center settings](#)

[Map interaction attributes to Salesforce activity fields](#)

[Configure your softphone layout](#)

[Synchronize interaction attributes with the call log](#)

Optionally, do any of the following:

[Customize interaction details](#)

[Use different configuration settings for different agents](#)

Access the call center definition

The values in the Call Center Definition in Salesforce come directly from the managed package. Leave all the default settings unless directed to change them by technical support.

1. Go to **Setup** and search for **Call Centers**.
2. Click Call Centers.
   The All Call Centers page, which lists all current call center records, appears.
3. To delete an old call center definition, click **Del**.

Manage the call center settings

> **Prerequisite**: [Add a PureConnect Call Center Settings tab in Salesforce](#).

When you set up a call center for the first time or upgrade to a new managed package, set the values for any new call center settings.

1. Click the PureConnect Call Center Settings tab you created.
2. Select the version of the call center definition from the drop-down.

Call Centers

PureConnect for Salesforce Lightning ▼

Settings

Set up a call center for PureConnect in Salesforce ?

PureConnect Cloud Enabled ?	☐

Server Settings

Web Proxy Address ?	[ ]
PureConnect Server 1 Name ?	[ ]
PureConnect Server 2 Name ?	[ ]

Single Sign On Settings

Enable Single Sign On ?	☑
Disable IC Auth ?	☐
Disable Windows Auth ?	☐
Allowed SSO Providers ?	[ ]

Server Sent Events Settings

Enable Server-sent Events ?	☐

Station Settings

Prevent station logout on navigation ?	☑

Wrap-up Settings

Enable Wrap-ups ?	☐

Call Log Settings

Enable Call Logs ?	☑
Enable Call Log Editing ?	☑
Enable Auto Association on Navigation ?	☐
Only Save Connected Interactions ?	☑

Save

3. If you are a PureConnect Cloud customer, click **PureConnect Cloud Enabled,** then specify the PureConnect Cloud URL provided by your PureConnect Cloud contact. Include /crm/ at the end; for example, https://your_caas_url/crm/.

4. If your CIC server is on premise, edit the next three settings:

   • Specify the **Web Proxy Address** that forwards calls from PureConnect for Salesforce to the CIC server. Include https:// and end with /api; for example, https://web_proxy_address/api.

   > **Note**: Your web proxy address is **case-sensitive**. See also the CIC Web Applications Installation and Configuration Guide in the PureConnect Documentation Library for details on setting up the proxy. If you follow those instructions, the web proxy address is https://web_proxy_address/api.

   • Specify the **PureConnect Server 1 Name**.
   • Specify the **PureConnect Server 2 Name** used for switchovers.

5. If you are using Single Sign On, configure the next four settings:

   • To use Single Sign On, select **Enable Single Sign On**.

   > **Note**: Internet Explorer does not currently support SSO without special configuration of the web proxy. See the CIC Web Applications Installation and Configuration Guide, for full details on setting up the web proxy. See also *Single Sign On support in Internet Explorer*.

   • To prevent agents from using a CIC user ID and password to log on to PureConnect for Salesforce, select **Disable IC Auth**.
   • To prevent agents from using a Windows user name and password to log on to PureConnect for Salesforce, select **Disable Windows Auth.**

- Type a comma-separated list of the display names of the allowed SSO providers in **Allowed SSO Providers**.

  > **Note**: Include only those providers that should be shown. **Any providers not in the list are hidden**. If this setting is empty, no Identity Providers are shown. You can configure custom identity providers in Interaction Administrator. See Configure an identity provider in the PureConnect Documentation Library.

6. To use an improved, bandwidth reducing mechanism for retrieving messages from the server, select **Enable Server-sent Events**.

  > **Note**: Enabling both **Server-sent Events** in Salesforce and **Dynamic Content Compression** on the web server proxy can cause a delay in status change.
  >
  > When PureConnect for Salesforce uses **Server-Sent Events** as the push events mechanism, incorrect reverse proxy settings can prevent these from being proxied correctly. For IIS-based reverse proxies (version 7+), ensure that the **Response buffer threshold** setting of the Application Request Routing Cache module is set to 0. See the steps for enabling response buffering in the *CIC Web Applications Installation and Configuration Guide*.

7. To enable PureConnect for Salesforce users to stay logged into their CIC station when navigating away from the CIC client (CTI window), select **Prevent station logout on navigation**.

  > **Warning**: The independent station created by this option does not expire automatically. To force CIC stations to log off the PureConnect for Salesforce integration when CIC does not detect any agent activity during a specified period, also add the Interaction Administrator **INDEPENDENT_STATION_TIMEOUT** General Server parameter and specify a valid time in minutes. To enforce a timeout, CIC requires both this setting and the server parameter. This option requires CIC 2017 R3 Patch 8 or later.

8. If one or more of your CIC workgroups require wrap-up codes, select **Enable Wrap-ups**. Wrap-ups do not work as expected in Internet Explorer when multiple browser tabs or windows are open.

9. If appropriate, change the default setting (selected) for Enable Call Logs and Enable Call Log Editing.

- **Enable Call Logs** provides access to the call logs from PureConnect for Salesforce and pops call logs for connected interactions.
- **Enable Call Log Editing** allows the agent to write and edit call logs. Call logs are the agents' notes about the call.

  > **Tip**: If using Internet Explorer, clear the **Enable Call Log Editing** setting. Internet Explorer has problems saving the call log when multiple browser tabs or windows are open. This setting prevents edits to the call log altogether. If you clear **Enable Call Log Editing**, Salesforce initially creates an activity record when an agent picks up an interaction, but doesn't update the record during or after the interaction. As a result, Salesforce does not save data that is only available during or after the call, such as duration or wrap-up codes.

10. To associate the current Salesforce record automatically to the interaction's call log as the agent navigates, select **Enable Auto Association on Navigation**.

11. To include only connected interactions in the call log, select **Only Save Connected Interactions**. (This is the default setting.)

  To include interactions that **did not connect** in the call log, **clear** this option. Clearing this option enables you to show that work was done even if the interaction never connected.

10. Click **Save**.

Map interaction attributes to Salesforce activity fields

This task is optional. After you set up a call center for the first time or upgrade the managed package, map any newly supported interaction attributes or keywords to Salesforce activity fields.

> **Note**: These activity fields must be string fields. However, if you use Salesforce features to copy the value of a string field to a field of a different data type, you can use data or number fields. For more information, see the Salesforce documentation on Workflow and Lightning Process Builder.

1. Click the **PureConnect Call Center Settings** tab you created.
2. Select the version of the call center definition from the drop-down.
3. Under **Activity Field Mapping**, click **Add** to create a new mapping.
4. Type the interaction attribute or assigned keyword. For more information and a list of supported attributes, see the following *Synchronize interaction attributes with the call log* section.
5. Select a field from the **Salesforce Fields** list.
6. Click **Save**.

> **Note**: Although you can map interaction attributes after assigning users to a call center, follow the sequence described here of mapping interactions first and then assigning users. This sequence ensures that users do not receive interactions that are not mapped.

Configure your softphone layout

In a softphone layout, you can control which call-related fields appear and the Salesforce objects that are searched for an incoming call. How to modify a softphone layout is described in *Designing a Custom Softphone Layout* in the Salesforce help, https://help.salesforce.com/articleView?id=cti_admin_phonelayoutscreate.htm&type=5.

- To configure which initial call log associations are added to the call log drop-down, add or remove objects from the "Display these salesforce.com objects" section on the respective call types (Inbound, Outbound, or Internal).

  > **Note**: If only one Salesforce Object is found, it is selected and associated to the interaction's call log.

- On the Inbound Call Type only, under "Screen Pop Settings" you can configure what happens during a screen pop when no matches, a single match, or multiple matches occur.

  > **Note**: The Salesforce help topic, *Designing a Custom Softphone Layout*, goes into greater detail. For more information about configuring screen pops, see the Screen Pop section of this guide.

Synchronize interaction attributes with the call log

The integration gives you the option to synchronize interaction attributes to the Salesforce call log activity on inbound and outbound interactions. Synchronizing interaction attributes allows you to store any interaction attributes with the Salesforce call log. If call attributes change, even after disconnection, the data remains in sync between the interaction and the call log.

To configure the synchronization of attributes with the call log:

1. For each interaction attribute or keyword you'd like to map, create a custom field in Salesforce on the Activity object.
2. Map the custom field to the interaction attribute. See *Map interaction attributes to Salesforce activity fields*.

You can map to Salesforce any interaction attribute that you set before CIC removes the call from the agent's queue. The integration maps certain Task fields by default.

Interaction attributes

For information about the interaction attributes that you can use, see the Interaction Attributes Technical Reference in the PureConnect Documentation Library.

You can also use the following keywords as shortcuts in place of frequently used interaction attributes.

Keyword	Description
ANI	Lists the phone number of the caller.
Conference	Indicates that an interaction is a conference call. Excludes the interaction from reporting.
DNIS	Lists the phone number dialed.

Default fields in Salesforce

This table includes a list of data automatically captured for every interaction that an agent handles.

Field label	Description
Call Duration	Total duration of the call in seconds, from the time of connection to disconnection or transfer.
Call Object Identifier	CallID key assigned to the interaction.
Call Result	Wrap-up code assigned after the call disconnects. Agents specify wrap-up codes to indicate the nature of an interaction, for example, a completed sale, a customer dissatisfied with service, or a billing problem. If the CIC administrator configures and activates wrap-up codes for the workgroup the call came through, the wrap-up form displays once the call is disconnected.
Call Type	Indicates the call direction, either Inbound, Outbound, or Internal. All calls placed to or received from an extension on the same server as the agent are internal calls.
Comments	Empty field for any notes taken during the interaction.
Name	Displays the name from the Salesforce record that pops when the interaction connects or the name an agent used to make a click-to-dial call, such as a contact or lead. If multiple records match based on the ANI, this field is a drop-down list.
Related To	Displays an associated record from the Salesforce record that pops when the interaction connects or from which an agent makes a click-to-dial call, such as an account or opportunity. Note: To ensure that PureConnect for Salesforce saves call logs for custom objects, select Allow Activities when creating the custom object in Salesforce.
Subject	Displays the interaction type plus a date and time stamp. The date and time formatting is based on the browser's locale settings. Example: Call 8/10/2015, 8:55:17 AM

Customize interaction details

This task is optional. By default, interactions in PureConnect for Salesforce show four values in the following order: the name of the interaction (Case - 00001036), the ID of the interaction (2001236957), the state of the interaction (Connected), and the source of the interaction (customer@company.com).

You can change the default order of the displayed values or change the attributes used for each interaction type (Call, Callback, Chat, Email, and Generic Object).

Custom interaction details also control the information displayed in the My Interactions tab in the Email and Chat popup windows.
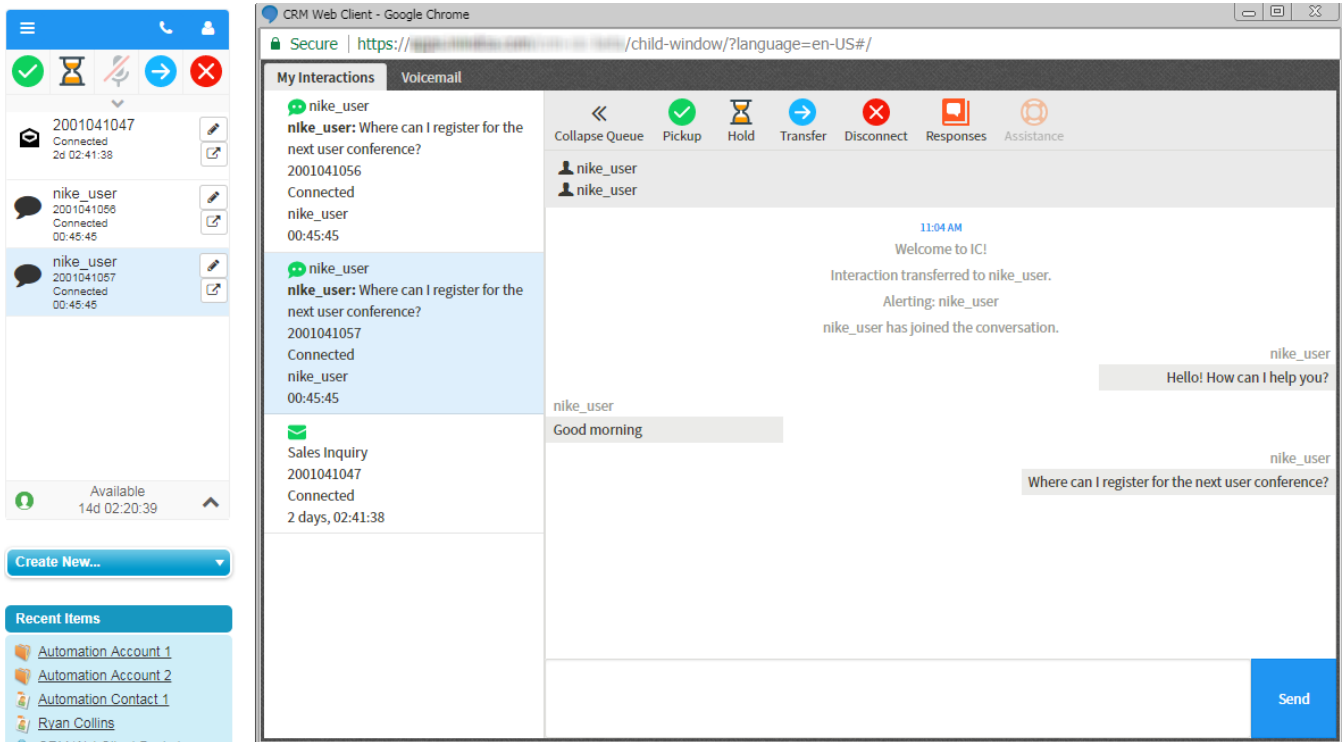
After setting up a call center for the first time or upgrading to a new version of the managed package, change the order of the attributes or the attributes used.

1. Click the **PureConnect Call Center Settings** tab you created.
2. Select the version of the call center definition from the drop-down.
3. Under the appropriate interaction type, add an interaction attribute to the text box and click **Add**.

   The interaction attribute appears in Available Attributes.

For information about which attributes you can use, see the Interaction Attributes Technical Reference in the PureConnect Documentation Library.

> **Note**: Not all interaction types support all attributes. For example, you can use the Eic_EmailType attribute only with email interactions. If you add an attribute for an invalid interaction type, the attribute does not appear in the interaction in PureConnect for Salesforce.

Keywords in place of interaction attributes

You can use certain keywords in place of interaction attributes. Some keywords are based on existing interaction attributes, others are not. Those keywords that are based on existing interaction attributes either check the values of multiple attributes or modify the value of an existing attribute.

- Example of checking multiple attributes

  The remoteAddress keyword first checks Eic_RemoteID for a value. If the value is empty, then the keyword checks Eic_RemoteAddress.

- Example of modifying existing attribute

  The state keyword is based on Eic_CallStateString. If the value is "Disconnected [Local Disconnect], the keyword returns "[Local Disconnect]."

The following table lists the available keywords by interaction type and the source of the value that the keyword returns.

Keyword	Source of value	Description
Interaction Type: Call		
name	Eic_RemoteId †	Indicates the location (for example, Indianapolis IN) or interaction type (Chat).
interactionID	property of an interaction	Lists the ID of the interaction.
campaignName	attribute of an Interaction Dialer call	Indicates the name of the campaign.
state	Eic_CallStateString (possibly abbreviated)	Indicates the state of the interaction (for example, Connected, Disconnected, and ACD - Assigned).
remoteAddress	Eic_RemoteId or Eic_RemoteAddress	Indicates the source of the interaction (for example, phone number, email address, server, or remote ID).
Interaction Type: Callback		
name	Eic_RemoteId †	Indicates the location (for example, Indianapolis IN) or interaction type (Chat).
interactionID	property of an interaction	Lists the ID of the interaction.
state	Eic_CallStateString (possibly abbreviated)	Indicates the state of the interaction (for example, Connected, Disconnected, and ACD - Assigned).
Interaction Type: Chat, Email, Generic Object		
name	Eic_RemoteId †	Indicates the location (for example, Indianapolis IN) or interaction type (Chat).
interactionID	property of an interaction	Lists the ID of the interaction.
state	Eic_CallStateString (possibly abbreviated)	Indicates the state of the interaction (for example, Connected, Disconnected, and ACD - Assigned).
remoteAddress	Eic_RemoteId or Eic_RemoteAddress	Indicates the source of the interaction (for example, phone number, email address, server, or remote ID).

†The name keyword checks Eic_RemoteName for a value. If the interaction is a conference, then the keyword displays "Conference."

1. To move the added attribute from Available Attributes to Selected Attributes, click the right arrow.
2. To add more interaction attributes, repeat steps 3 and 4.
3. To change the order in which the values of the attributes appear in the interactions in PureConnect for Salesforce, click the up and down arrows.
4. When finished adding and ordering attributes, click **Save**.

The new order or attributes appear when the integration rebuilds the page (upon page refresh, navigation to other pages, or logon) and affect interactions already appearing in PureConnect for Salesforce.

Assign users to the call center

Salesforce users cannot use call center features until you have assigned them to a call center. There are a couple of different ways to assign users to a call center. For more information, see Managing Call Center Users in the Salesforce documentation.

Use different configuration settings for different agents

You can configure custom call centers for different user profiles. For example, you can require one group of agents to use wrap-up codes while not requiring it of another agent group.

To create custom call centers:
1. Go to **Setup** and search for **Call Centers**.
2. Click Call Centers.
   The All Call Centers page, which lists all current call center records, appears.
3. Click the Name of your existing call center.
4. Click **Clone**.
5. Type a unique **InternalName**.
6. To distinguish it from any other call centers, edit the **Display Name**.
7. Click **Save**.
8. Assign the appropriate users to this call center.

To configure custom call centers:
1. Click the PureConnect Call Center Settings tab you created.
2. Select the call center definition you just created from the drop-down.
3. Assign custom configuration values to this call center.
4. Click **Save**.

Single Sign On support in Internet Explorer

To use single sign on with Internet Explorer, add a custom reverse proxy route. (PureConnect Cloud does not support this solution.) In addition, you can use only CIC or Windows authentication as the identity provider with this configuration.

> **Note**: See the _CIC Web Applications Installation and Configuration Guide_ in the PureConnect Documentation Library for full details on setting up the web proxy.

To add the custom reverse route for your proxy engine, do one of the following:

Nginx

1. In Nginx /conf/nginx.conf, add the following proxy pass configuration:

```
location /crm-web-client-cic/ {
proxy_pass https://apps.hive.genesys.com/crm-web-client-cic/latest/index.html?style=salesforce;
}
```

2. Restart the Nginx process.
3. Log into Salesforce account as an administrator and configure the Salesforce Call Center to use the Nginx web server as the CTI Adapter URL. Update your CTI Adapter URL to be {{proxyAddressForSSO}}/index.html?style=salesforce.

   For example: Change "https://apps.hive.genesys.com/crm-web-client-cic/latest/index.html?style=salesforce" to "https://<serverName>/crm-web-client-cic/latest/index.html?style=salesforce"

Apache

1. To add the following Rewrite Rule, modify the Apache configuration:

```
RewriteRule "/crm-web-client-cic/" "https://apps.hive.genesys.com/crm-web-client-cic/latest/index.html?style=salesforce;"
```

2. Restart the Apache process.
3. Log into Salesforce account as an administrator and configure the Salesforce Call Center to use the Apache web server as the CTI Adapter URL. Update your CTI Adapter URL to be {{proxyAddressForSSO}}/index.html?style=salesforce

For example: Change "https://apps.hive.genesys.com/crm-web-client-cic/latest/index.html?style=salesforce" to "https://<serverName>/crm-web-client-cic/latest/index.html?style=salesforce"

IIS

1. Create a new Application named crm-cic with any Physical Path.
2. Create a web.config file with the following content:

```
<?xml version="1.0" encoding="UTF-8"?>
<configuration>
<system.webServer>
<rewrite>
<rules>
<rule name="crm-web-client-cic" stopProcessing="true">
<match url="(.*)" />
<action type="Rewrite" url="https://apps.hive.genesys.com/crm-web-client-cic/latest/index.html?style=salesforce"/>
</rule>
</rules>
</rewrite>
</system.webServer>
</configuration>
```

3. Use iisreset to restart the IIS Server.
4. Log into Salesforce account as an administrator and configure the Salesforce Call Center to use the IIS web server as the CTI Adapter URL. Update your CTI Adapter URL to be {{proxyAddressForSSO}}/index.html?style=salesforce.

   For example: Change "https://apps.hive.genesys.com/crm-web-client-cic/latest/index.html?style=salesforce" to "https://<serverName>/crm-web-client-cic/latest/index.html?style=salesforce."

Upgrade the integration managed package

Application upgrades are automatic and do not typically require any manual intervention. However, if the upgrade includes changes to the Call Center Settings, upgrade your managed package to take advantage of the new functionality.

Upgrade from version 2.3 or earlier of the managed package

Migrate to a new call center definition

Add a new PureConnect Call Center settings tab

Upgrade from version 2.3 or earlier of the managed package

When you upgrade from version 2.3 or earlier of the managed package to the current version, the managed package installs a new call center definition file in your Salesforce organization. After upgrade, follow these instructions to copy and paste values from the old call center definition to the new PureConnect Call Center Settings tab.

> **Note**: To determine the current version of the installed managed package, go to **Setup** > **Installed Packages**, and note the version number next to PureConnect for Salesforce.

Follow the steps in the following processes in order:
1. Migrate to a new call center definition.
2. Add a new tab in Salesforce.
3. Populate the PureConnect Call Center Settings tab.
4. Assign users to the call center.
5. Optionally, map any newly supported interaction attributes of keywords to Salesforce activity fields. See *Map interaction attributes to Salesforce activity fields*.

Migrate to a new call center definition

As part of upgrading your Salesforce integration, you migrate to a new call center definition.
1. Upgrade the managed package. See *Install or Upgrade the managed package*.
2. When the upgrade completes, go to **Setup** and search for **Call Centers**.
3. Click **Call Centers**.
   You see two versions of the call center definition (possibly more if you have previous versions you never removed).

4. Click the name of the older call center definition. If you have more than one old call center definition files, click the one currently used by the integration (assigned to the Call Center field on the user settings).
5. Copy and save all the values to an external document or file.
6. To return to the All Call Centers screen, click the browser back button.
7. Click **Edit** next to the newly installed call center definition.
8. Verify that the setting values in the new call center definition match the values you saved. The new call center definition includes only the first six settings. You manage the remaining settings from the PureConnect Call Center Settings page.

Add a new PureConnect Call Center Settings tab

The PureConnect Call Center Settings tab allows you to access and edit custom settings related to your call center.

As part of upgrading your Salesforce integration, follow the same instructions as when setting up the integration for the first time. See *Add a PureConnect Call Center Settings tab in Salesforce*.

Populate the PureConnect Call Center Settings tab

1. Click the new tab.
2. Select the new version of the call center definition from the drop-down.

3. Assign the remaining values from your old call center definition file to the settings listed here. For a description of these settings, see Manage the call center settings.

Assign users to the call center

Salesforce users cannot use call center features until you have assigned them to a call center. There are a couple of different ways to assign users to a call center. For more information, see Managing Call Center Users in the Salesforce documentation.

Migrate to PureConnect for Salesforce Lightning

The PureConnect for Salesforce Lightning integration offers significant advantages over the PureConnect for Salesforce integration in the Classic mode. In general, the Lightning Experience has a more modern user interface that enables you to navigate more quickly as compared to the Classic interface.

Most importantly, there is one session during your time in the Lightning Experience. In Classic mode, CIC creates a new session every time an agent acts. This puts an extra load on the CIC server and off-server Session Managers. Lightning mode eliminates those page refreshes. The soft phone does not have to reload when Salesforce reloads with each page refresh. The PureConnect for Salesforce integration can then use one session for the day which improves the scalability of PureConnect for Salesforce.

Migration Steps from Salesforce Classic to Salesforce Lightning

To migrate from Salesforce Classic to Salesforce Lightning:
1. Upgrade or verify that your managed package is version 3.6 or higher. This is required for PureConnect for Salesforce Lightening. See *Install or Upgrade the managed package*.
2. Migrate your settings from the "PureConnect for Salesforce v3" Call Center to the new "PureConnect for Salesforce Lighting" Call Center.
3. Move Lightning Experience users from the "PureConnect for Salesforce v3" Call Center to the "PureConnect for Salesforce Lightning" Call Center.
4. Enable the "Open CTI Softphone" check box in the App Options for Lightning Apps where customers want to use PureConnect for Salesforce.

> **Tip**: See also Troubleshooting_the_CTI_Softphone.

Migrate Call Center settings

As part of a migration from Salesforce Classic to Salesforce Lightning, copy your "PureConnect for Salesforce v3" Call Center to the new "PureConnect for Salesforce Lighting" Call Center.
1. Click your user name and select Switch to the Lightning Experience.
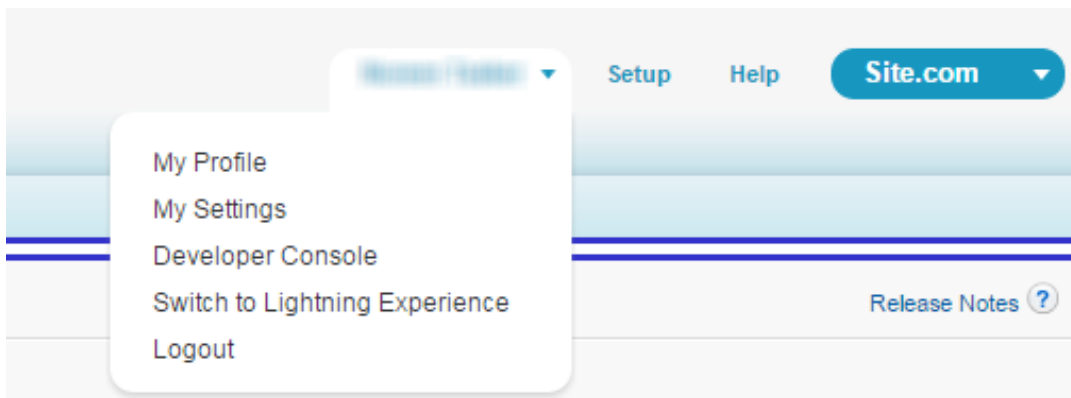
2. From the **More** menu, select Call Center Settings.
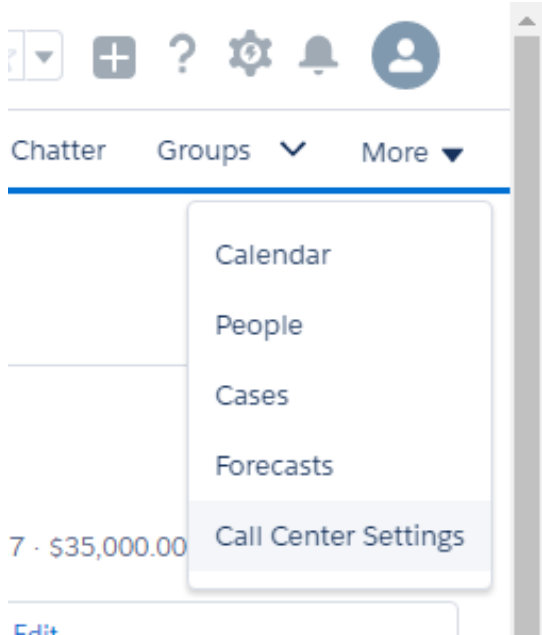
3. Copy the settings from the **PureConnect for Salesforce v3** Call Center to the **PureConnect for Salesforce Lightning** Call Center.

    a. In the **Call Centers** tab, from the **Choose a Call Center** list, select **PureConnect for Salesforce v3**.

Call Centers

PureConnect for Salesforce v3 ▼

Settings

Set up a call center for PureConnect in Salesforce ?

| PureConnect Cloud Enabled | ☐ |

Server Settings

Web Proxy Address   https://webbuild.ininlab.com/webapps/webic/clie

PureConnect Server 1 Name   CICServerName

PureConnect Server 2 Name   [ ]

Single Sign On Settings

Enable Single Sign On   ☑

Disable IC Auth   ☐

Disable Windows Auth   ☐

Allowed SSO Providers   [ ]

Server Sent Events Settings

Enable Server-sent Events   ☑

Station Settings

Prevent station logout on navigation   ☑

Wrap-up Settings

Enable Wrap-ups   ☑

Call Log Settings

Enable Call Logs   ☑

Enable Call Log Editing   ☑

Enable Auto Association on Navigation   ☐

Only Save Connected Interactions   ☑

[Save]

Activity Field Mapping

Map interaction attributes to Salesforce activity fields ?

b. Select and copy the **Web Proxy Address** to the Clipboard.

c. Note the CIC Server name or names and your selections in the **Settings** boxes.

d. From the **Choose a Call Center** list, select **PureConnect for Salesforce Lightning**.

e. Paste the copied **Web Proxy Address** and duplicate the other settings used in the PureConnect for Salesforce v3 Call Center.

f. Click **Save**.

4. Repeat the previous step and copy any settings for A**ctivity Field Mapping, Customize Interactions Details** and **Integration Console Events** to the PureConnect for Salesforce Lightning Call Center.

Move users to the new PureConnect for Salesforce Lightning Call Center

As part of a migration from Salesforce Classic to Salesforce Lightning, you can move some or all users to the new call center by changing the Call Center setting on the user records.

To move a single user:

1. In the Lightning Experience, in the **Setup** menu, select **Users**. **Then from the Users list, select Users**.
2. In the **Setup Users** view, select a user.
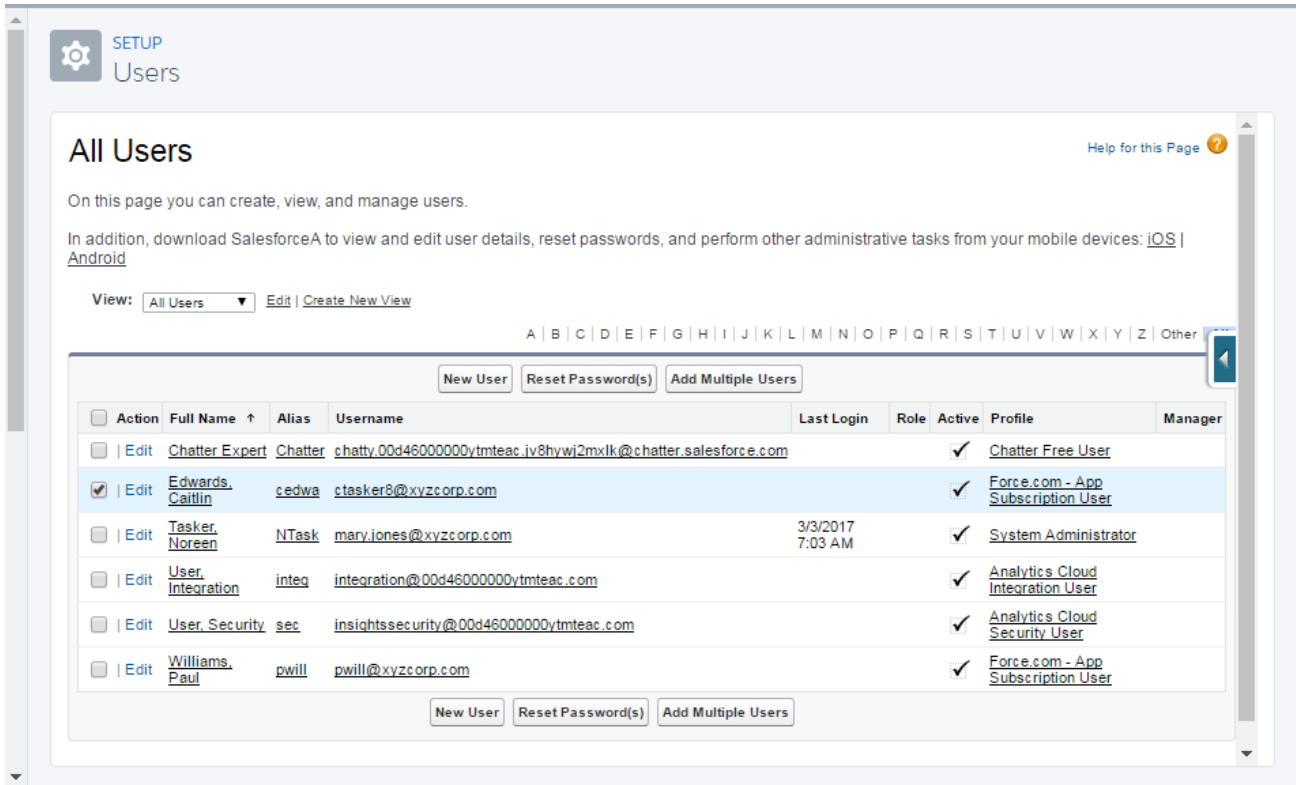
3. Click **Edit**.
4. Set the user's Call Center to PureConnect for Salesforce Lightning.

Tip: Click the **Call Center Lookup** icon. Clear the Search text box in the Lookup dialog box. Click "Go!," then select PureConnect for Salesforce Lightning from the Search Results.
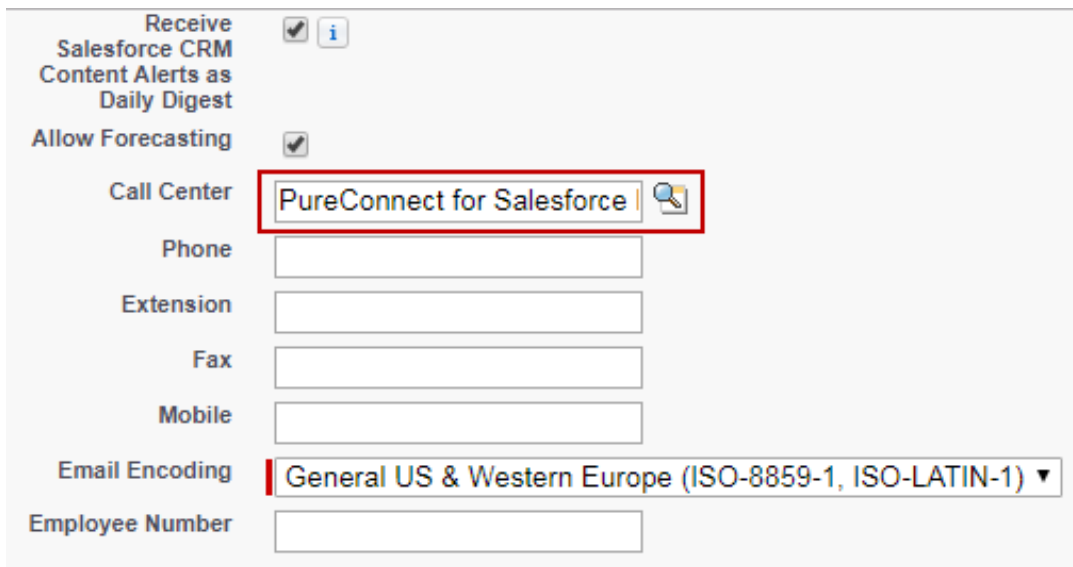
5. Click **Save**.

To move selected users:

1. In the Setup search text box, type **Call Center**. Then select Feature Settings > Service > Call Center > **Call Centers**.

2. In the Call Centers view, click **Edit** for **PureConnect for Salesforce Lightning**.

3. In the PureConnect for Salesforce Lightning Call Center view, click **Manage Call Center Users**.

4. In the PureConnect for Salesforce Lightning: Manage Users view, click **Add More Users**.

5. In the PureConnect for Salesforce Lightning: Search for New Users dialog box, set any necessary search criteria and click **Find**.
6. Select some or all the users in the search results and click **Add to Call Center**.

Enable the Open CTI softphone

As part of a migration from Salesforce Classic to Salesforce Lightning, enable the Open CTI softphone. The CTI softphone appears as a Phone icon in the lower left corner of the Salesforce Lightning Experience. Clicking the phone icon displays the softphone application inside the Salesforce Lightning Experience. In order for the phone icon to appear, you must associate it with the appropriate Lightning app.

> **Note**: See also the Salesforce documentation, <u>Add Users and a Softphone to the Call Center</u>.
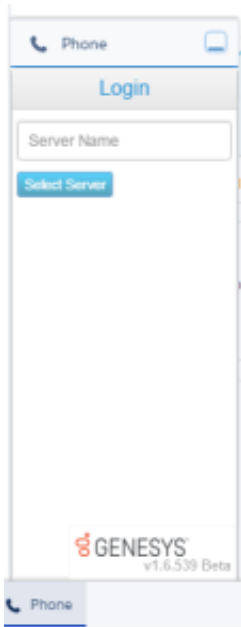
1. In the Lightning Experience, in the Setup search text box, type "App Manager." Select Apps > **App Manager**.
2. In the Lightning Experience App Manager, find the LightningSales row. Click the down arrow and select **Edit**.

3. In the Edit App view, select the **Utility Bar** tab.
4. Next to Utility Bar Items, click **Add**.
5. In the Search components text box, type phone. Then select **Open CTI softphone**.

6. Complete the Utility Item Properties as follows:

Label	Phone
Icon	call
Panel Width	200
Panel Height	450

PROPERTIES
Phone

↑ ↓ Remove

▼ Utility Item Properties

*Label ℹ

Phone

To use an Icon other than the default, enter the name of a Lightning Design System utility Icon. For example, custom_apps.

Icon ℹ

call

Panel Width ℹ

200

Panel Height ℹ

450

☑ Load in background when app opens ℹ

> **Note**: **Load in background when app opens** checkbox must be selected. Clearing this checkbox can cause the phone to not function correctly.

7. Click **Done**.

Troubleshooting the CTI Softphone

If the PureConnect for Salesforce softphone is not visible in the Lightning Experience, check the following:

- Ensure you have assigned the user to the PureConnect for Salesforce Lightning" Call Center.
- Ensure you have enabled the Open CTI softphone.
- Ensure the User is not using a Classic App in Lightning. Salesforce does not support the Open CTI softphone for Classic Apps running in the Lightning Experience.

Upgrade from Salesforce Desktop or Salesforce Web

Starting with the release of CIC 2017 R1, the previous Salesforce Desktop and the Salesforce Web integrations were no longer sold or available to install from Genesys. The last CIC release to support these integrations was CIC 2016 R4.

The Salesforce Desktop integration will eventually stop functioning because Salesforce is retiring the API the integration depends on, so it is at end of life. The Salesforce Web integration will remain under standard support and upgrade terms.

All Salesforce integration customers should upgrade to the PureConnect for Salesforce integration as soon as possible. To plan the upgrade for your company, use this document.

Prerequisites for upgrading to PureConnect for Salesforce

Set up the integration

Configure the integration

Side-by-side use with a CIC client

More considerations for PureConnect Cloud customers

Prerequisites for upgrading to PureConnect for Salesforce

Before upgrading from Salesforce Desktop or Salesforce Web, be aware of these prerequisites.
- Administrator Requirements
- PureConnect Cloud customers must open a support ticket to request a PureConnect Cloud URL for their PureConnect Cloud server. This URL is a Reverse Proxy and you need it to complete the Call Center Settings.
- Manage the call center settings.
- If you already have Salesforce Desktop or Salesforce Web integration licenses, you do not need more integration licenses for PureConnect for Salesforce.

Set up the integration

When upgrading from Salesforce Desktop or Salesforce Web, you follow many of the same steps as required in a first time setup for PureConnect for Salesforce.
- Install the managed package, configure the call center settings, and assign users to a call center in Salesforce. See First-time setup.
- Set up single sign-on (SSO) in CIC. See the Identity Providers Technical Reference in the PureConnect Documentation Library.

> **Note to Internet Explorer users:** Add a custom reverse proxy route. Internet Explorer does not currently support SSO with PureConnect Cloud. In addition, you can only use CIC or Windows authentication as the identity provider with this configuration. For more information, see *Single Sign On support in Internet Explorer*.

- Administrators must enable SSL between the web proxy and PureConnect for Salesforce. See CIC Web Applications Installation and Configuration Guide, in the PureConnect Documentation Library, for details.

Configure the integration

Configuration of PureConnect for Salesforce is the same for new installations and upgrades. When upgrading from Salesforce Desktop or Salesforce Web, be aware of some differences from your previous Salesforce integration. Here are some highlights:

- Synchronize interaction attributes with the call log

  The integration automatically captures and stores certain data for every interaction that the agent handles. You can also synchronize more attributes.

- *Customize interaction details*

  By default, the integration displays four values for each interaction. You can reorder these values or add different details to display.

  > **Note**: Previously, you could create custom displays by using SF_LabelNames and SF_LabelValues. Now create custom displays using the **Customize Interaction Details** section on the Call Center Settings tab.

- Configure Interaction Dialer, if applicable.
- Configure your softphone layout.
- Screen pop multiple pages and Screen pop a Salesforce search result.

  By default, the integration can screen pop to a Salesforce object, a Visualforce page, a search page, or new record based on ANI.

  > **Note:** Previously, for custom Visualforce pages, Salesforce Desktop and Salesforce Web passed the ANI to the page using a query string parameter named 'ANI' but PureConnect for Salesforce uses the 'key' parameter. Update Custom Visualforce pages that are expecting the 'ANI' parameter to use the new parameter name or to check for both parameter names.

  If an inbound ANI includes a +1 prefix (+13175551212), PureConnect for Salesforce removes the prefix before searching Salesforce for the number (3175551212). To pass the full ANI with a +1 prefix, create a SF_SearchValue attribute and set the value of SF_SearchValue to the value of the Eic_RemoteTnNormalized attribute.

- The integration currently supports custom screen pops using the following attributes:

  - SF_URLPop

    See Screen pop a Salesforce page.

  - SF_SearchValue

  The ability to display multiple pages in a single screen pop is still available in the PureConnect for Salesforce integration. However, the PureConnect for Salesforce integration does it differently from the Salesforce Web Client integration. The older integration piped multiple URLs to the SF_URLPop attribute, PureConnect for Salesforce uses the SF_URLPopSubTabs attribute for additional URLs.

1. Set SF_URLPop to the URL for the first (primary) screen pop.
2. Set SF_URLPopSubTabs to the additional subtabs associated with the primary URL.

   > **Note**: Piping does work with this attribute. If any tabs include external URLs, add these external URLs to the console's whitelist so that they display correctly.

See Screen pop a Salesforce search result for more information about these attributes and how you configure them to work with regular inbound calls.

The integration does not support custom screen pops using the following attributes:

- SF_CADNames
- SF_CADValues
- SF_URLShouldAutomaticallyScreenPop
- SF_URLPopLink
- SF_ApexBeforeScreenPop

Side-by-side use with a CIC client

An agent can use PureConnect for Salesforce at the same time as any other CIC client, such as Interaction Desktop or Interaction Connect.

Log on to PureConnect for Salesforce and the CIC client in any order. If you log on to the CIC client first, then log on to PureConnect for Salesforce as the same agent, you do not need to select a station. The CIC client syncs the station information to PureConnect for Salesforce.

If your CIC administrator has not enabled SSO and you do not have a CIC server switchover pair, log on to the CIC client before logging on to PureConnect for Salesforce. Otherwise PureConnect for Salesforce kicks you off, and you must reenter your password.

More considerations for PureConnect Cloud customers

In order for PureConnect for Salesforce to log agents back on automatically after a switchover, the integration must be using SSO. Internet Explorer does not currently support SSO with PureConnect Cloud. Without SSO, a switchover causes PureConnect for Salesforce to disconnect and forces it to reconnect. Agents must manually log back on.

Configure Interaction Dialer

Customers who already have the Interaction Dialer add-on for CIC can harness the power of predictive dialer capabilities to automate sophisticated call campaigns in PureConnect for Salesforce.

Types of Interaction Dialer Campaigns

Interaction Dialer works with several types of campaigns. In all campaigns, Interaction Dialer automatically dials phone numbers to reach as many customers as possible. To define an appropriate set of call disposition buttons for agents to use in the softphone, administrators must know each campaign's dialing mode.

> **Note**: PureConnect for Salesforce does not support agentless calling mode because agentless campaigns do not require Salesforce agents. Campaigns in agentless mode typically play an audio recording to answering machines or send faxes to fax machines.

A campaign's dialing mode is one of the following:

Preview

Preview dialing mode presents the agent with information about the targeted party before the agent calls. If Skip is available, the agent reviews the information for the customer record and then calls or skips to the next record. When ready, the agent manually starts the call. This mode is the slowest of the Dialing methods, but it prevents any chance of abandonment.

Predictive

Predictive dialing mode automatically connects the call when it enters the agent's queue. The server predicts agent availability based on previous call behavior. The server predicts the number of calls it must make to provide each agent with a targeted party at the moment the agent becomes available. This mode requires at least seven logged on agents, preferably more. The larger the agent pool, the more accurate the predictions are, minimizing idle time further than in Power mode and decreasing the likelihood of an abandoned call.

Power

Power dialing mode places the next call when an agent becomes available, regardless of the agent's past behavior. Power mode increases the speed at which it dials from predictive mode and is the fastest of all the dialing modes, but it has the highest likelihood of abandons.

Requirements for Interaction Dialer with PureConnect for Salesforce

The following CIC and Interaction Dialer versions are minimum requirements for Interaction Dialer to work with PureConnect for Salesforce:

- Customer Interaction Center 2015 R4
- Interaction Dialer 2015 R4, latest patch

An agent must have the following to be able to log on to and run Interaction Dialer campaigns:

- User security rights to view all workgroups involved in the campaign
- Interaction Dialer Add-On user license (I3_ACCESS_DIALER_ADDON)
- The server must have the I3_FEATURE_DIALER_BASE or I3_FEATURE_DIALER_ADVANCED license.

Configuration Overview

Interaction Dialer administrators configure the campaigns that PureConnect for Salesforce uses. This chapter explains how CIC administrators use Interaction Administrator to configure required settings for Interaction Dialer to work with PureConnect for Salesforce.

> **Note**: The procedures in this section pertain to Interaction Dialer for CIC, and not to Genesys Cloud's Outbound Dialing feature. These procedures also rely heavily on CIC configuration. For more information, see the [Interaction Dialer Help](#) in the PureConnect Documentation Library. After making certain configuration changes to existing campaigns and scripts, restart the campaign.

- Interaction Dialer administrators create base scripts for the Outbound Dialer server using the Scripts container in Interaction Administrator. PureConnect for Salesforce uses only a subset of Interaction Dialer script functionality and doesn't actually show script text or any additional pages.
- Interaction Dialer administrators create campaigns for the Outbound Dialer server using the Campaigns container in Interaction Administrator. Associate the scripts you define in the Scripts container with a campaign.

Create scripts

Interaction Dialer administrators create base scripts for the Outbound Dialer server using the Scripts container in Interaction Administrator. PureConnect for Salesforce only uses a subset of Interaction Dialer script functionality and doesn't actually show script text or any additional pages.

1. In the Interaction Administrator tree, expand the **Interaction Dialer** container.
2. Click the **Scripts** container.

   A list of all base scripts appears. You can search for scripts by name.

   > **Note**: To distinguish Salesforce scripts from scripts that are potentially incompatible with Salesforce, consider adding a prefix such as "SF_" to the names of Salesforce scripts.

3. To edit a script, click its name in this list.
4. To configure script settings, click the **Miscellaneous** section.
5. To configure disposition settings, click the **Pages** section.

Configure script settings (Miscellaneous section)

Settings in this section apply to scheduled callbacks and miscellaneous behavior, such as whether to disconnect dispositioned calls automatically. This table describes the behavior when you enable each respective setting.

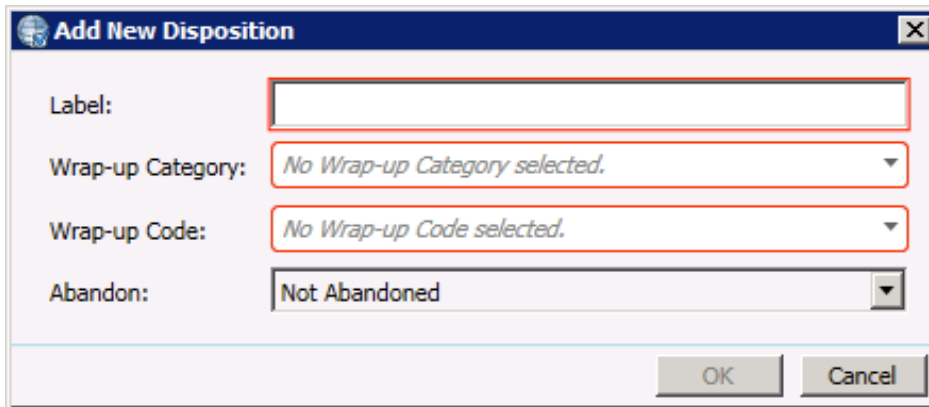| Setting	Description
Request Break Button	Not currently supported in PureConnect for Salesforce.
Preview Skip Button	Allows agents to skip a preview call before it is placed. In PureConnect for Salesforce, the Disconnect call control acts as the skip button.
24-Hour Time Format	Not currently supported in PureConnect for Salesforce.
Editing of Number to Dial	Not currently supported in PureConnect for Salesforce.
Entry of Callback Number	Not currently supported in PureConnect for Salesforce.
Agent Callbacks	Allows agents to "own" callbacks that result from the use of this script. If an agent chooses to own the callback, then when it matures, Interaction Dialer attempts to route the callback to that agent. If the agent is not available, then Interaction Dialer routes the callback to the first available agent.
Pickup Alerting Calls	Not currently supported in PureConnect for Salesforce.
Auto-disconnect Call upon Disposition	Automatically disconnects a call when the agent selects a disposition for it.

Configure dispositions (Pages section)

Dispositions categorize call results using a set of standard wrap-up categories and campaign-specific wrap-up codes. An agent must disposition every Interaction Dialer call before the agent can receive the next call. An agent selects the disposition for a call from a drop-down menu after clicking the Disposition button in PureConnect for Salesforce.
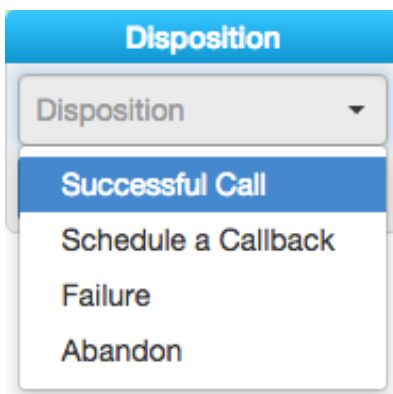
"Page Dispositions" is the only area under Pages used by the PureConnect for Salesforce integration.

1. Click the Default Page tab and scroll down to Page Dispositions.
2. On the toolbar, click the **Add** button (plus sign).

   The Add New Disposition dialog box appears.

3. In the Label box, type a descriptive word or phrase that summarizes the disposition.

   This text appears in the drop-down menu in the softphone when the agent dispositions a call.

4. In the Wrap-up Category list, select the completion status of the call.

   Wrap-up categories are also known as reason codes. Reports use wrap-up categories to evaluate the success of the script.
5. Select a Wrap-up Code for the disposition.

   You define all wrap-up codes for each script in Interaction Administrator. Wrap-up codes categorize the outcome of each contact attempt for reporting and scheduling purposes. For example, "Doesn't Read the Newspaper" is a possible wrap-up code for a newspaper subscription campaign.

   > **Note**: Wrap-up codes enable in-depth reporting about a single campaign. Wrap-up categories provide for standardized reporting across multiple campaigns. See Interaction Dialer Help in the PureConnect Documentation Library for descriptions of each Wrap-up Category and Code.

6. From the Abandon list, select one of the following:
   - **Abandoned** if the call was lost. For example, if the contact disconnected the call before the agent connected, or if the call was dropped.
   - **Not Abandoned** if either the caller or agent intentionally ended the call.
7. Click **OK**.

Link scripts to campaigns

Interaction Dialer administrators create campaigns for the Outbound Dialer server using the Campaigns container in Interaction Administrator. For more information, see the Interaction Dialer Help in the PureConnect Documentation Library.

Associate the scripts you define in the Scripts container with a campaign.

1. In the Interaction Administrator tree, expand the **Interaction Dialer** container.
2. Click the **Campaigns** container.

   A list of all campaigns appears. You can search for campaigns by name.
3. To edit a campaign, click its name in this list.
4. Under Basic Configuration > Scripting, select **Base Script**.
5. Select the Salesforce script created for this campaign and click **Save**.
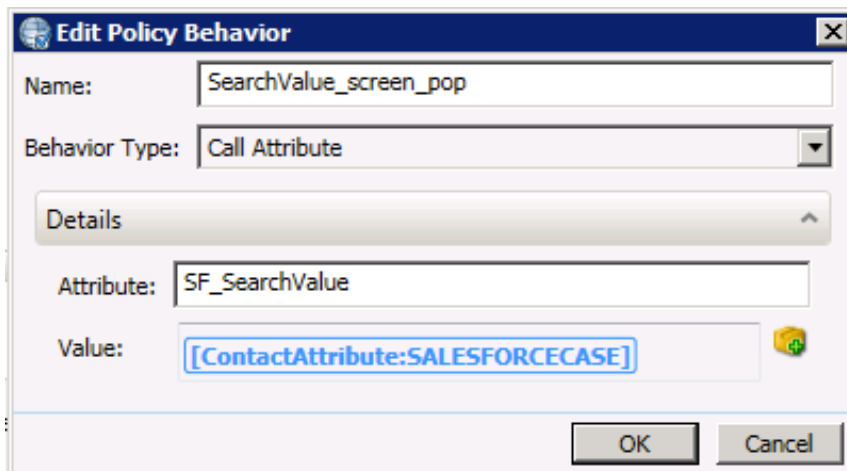
Customize screen pops

Interaction Dialer uses call attributes to determine which Salesforce page displays for the agent. The SF_URLPop custom call attribute screen pops a specific Salesforce page, and the SF_SearchValue custom call attribute screen pops a Salesforce search result for certain calls. You configure custom call attributes for Interaction Dialer in Interaction Administrator as policy sets and associate them with the campaign.

> **Note**: See *Screen pop a Salesforce page* and *Screen pop a Salesforce search result*.

This procedure relies heavily on CIC configuration. For more information about configuring policy sets, see the Interaction Dialer Help in the PureConnect Documentation Library.

1. In Interaction Administrator, go to **Interaction Dialer** > **Advanced Interaction Dialer**.
2. Click **Policy Sets**.
3. Create a new PreCall policy set for each custom call attribute that performs a screen pop.
   - To determine which calls this policy affects, add a Condition.
   - Add a Behavior Type and set its attribute to the custom call attribute. In this example, PureConnect for Salesforce searches for the case number and screen pops when the SF_SearchValue custom call attribute is set on an incoming interaction.

4. Save the policy set.
5. Go to **Interaction Dialer** > **Campaigns**.
6. Click the campaign that this policy set applies to.
7. Click **Automation**.
8. Select the policy set you just created.

   In this example, you selected SF_SearchValue Policy.
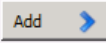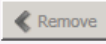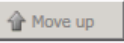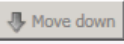
9. Save the campaign.

When a call comes in to this campaign, Interaction Dialer assigns the custom call attribute of SF_SearchValue with a value of the customer case number, which screen pops the case in Salesforce.

Configure Salesforce Omni-Channel Presence Sync

You can use both PureConnect and Salesforce Omni-Channel to route work to agents. This provides a consolidated agent experience without the typical problems associated with routing interactions. You can protect an agent from being routed interactions from both products simultaneously by setting statuses to sync between Omni-Channel and PureConnect in the Salesforce Call Center Settings. Agents can toggle between accepting work from Omni-Channel and accepting ACD interactions from PureConnect.

Omni-Channel Setup in Salesforce

Enable Omni-Channel sync and Map Statuses

Omni-Channel Setup in Salesforce

Before you map statuses in the Salesforce Call Center Settings, make sure you have completed these configuration steps in Salesforce.

1. Enable Omni-Channel.

   For more information, see Enable Omni-Channel in the Salesforce documentation, https://help.salesforce.com/articleView?id=omnichannel_enable.htm&type=0.

2. Create service channels.

   For more information, see Create Service Channels in the Salesforce documentation, https://help.salesforce.com/articleView?id=service_presence_create_service_channel.htm&type=0.

3. Create presence statuses.

   These statuses populate the menus in the **Omni-Channel Status Sync Settings** section of the Salesforce Call Center Settings.

   > **Note**: You cannot delete a presence status once it has been used, but you can rename it.

   a. Create an Omni-Channel status that you want mapped to the PureConnect for Salesforce status agents use when they are available to take ACD interactions.
      i. Click **New**.
      ii. Add a name for the status, for example, **In_CIC**.
      iii. Select **Busy** under Status Options.
      iv. Select a channel to assign to your status and move the status to Selected Channels.
      v. Click **Save**.

      In this example, the **In_CIC** Omni-Channel status syncs with an Available-type status in PureConnect for Salesforce and indicates in Omni-Channel that agents are busy working on interactions in PureConnect for Salesforce. When agents select either status in either product, the corresponding status changes in the other product.

      > **Note**: This status then appears in the **Omni-Channel Status** drop-down list in the **Mapped Status** portion of the Omni-Channel Sync Settings.

   b. Create a **transition** status that appears in Omni-Channel when agents change from Available in PureConnect for Salesforce to another status.

      This Omni-Channel status is the status that you want your agents to be in after they change from Available in PureConnect for Salesforce to another status. For example, in Omni-Channel, agents could immediately receive interactions (an online status option) or be put in a status where they would not receive interactions (a busy status option)

      The following steps for an example status assume that agents do not immediately receive interactions. Instead, they are placed in a "transition" state (a busy status option) until they are ready to receive interactions in Omni-Channel. When they are ready to receive interactions in Omni-Channel, they would manually change their status in Omni-Channel.

      i. Click **New**.
      ii. Add a name for the status, for example, Transition.
      iii. Select **Busy** under Status Options.
      iv. Select a channel to assign to your status and move the status to Selected Channels.
      v. Click **Save**.

      > **Note**: This status then appears in the **Omni-Channel Status** drop-down list in the **Transition Status** portion of the Omni-Channel Sync Settings.

      For more information, see Create Presence Statuses in the Salesforce documentation, https://help.salesforce.com/articleView?id=service_presence_create_presence_status.htm&type=0.

4. Create a permission set and assign it to users.

   For more information, see Create, edit, delete and assign a permission set in the Salesforce documentation, https://help.salesforce.com/articleView?id=000206679&type=1&language=en_US.

5. Add an Omni-Channel component.

   The component appears in the bottom toolbar in Service Cloud.

   For more information, see Add the Omni-Channel Widget to the Salesforce Console in the Salesforce documentation, https://help.salesforce.com/articleView?id=service_presence_add_presence_widget_to_console.htm&type=0.

6. Finally, enable Omni-Channel sync and map statuses in the Omni-Channel Sync Settings section of Call Center Settings. (See next section).

Enable Omni-Channel sync and Map Statuses

Omni-Channel Sync Settings enable you to set single direction or bi-directionalstatus mapping between Omni-Channel and PureConnect for Salesforce statuses. You can set multiple status maps and control the availability your agents for interactions in both systems.

> **Note**: PureConnect Status is the CIC status used in PureConnect for Salesforce.

1. Click the PureConnect Call Center Settings tab you created.
2. Select the version of the call center definition from the drop-down list.
3. Under Omni-Channel Sync Settings, select **Enable Omni-Channel Sync**.

> **Note**: By default, Enable Omni-Channel Sync is not selected.
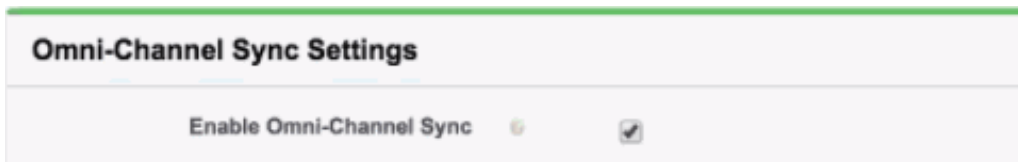
4. To create a status mapping pair, in the **Mapped Status** section, follow these steps. These settings control the syncing of Omni-Channel and PureConnect for Salesforce statuses.
   a. Select an **Omni-Channel Status** from the drop-down list.

   > **Note**: The Omni-Channel statuses in the drop-down lists in this section are the statuses that you set up in Salesforce.

   b. Select a direction for the status mapping.

   > **Note**: A bidirectional arrow indicates that when agents change their status in **either** Omni-Channel or PureConnect for Salesforce, their status automatically changes in the **other** application.

   c. Type the name of a status in the **PureConnect Status** text box.
   d. To add another status mapping, click **Add**. Or proceed to the next step.
   Example: Selecting the *Available* status in PureConnect sets the agent's status to *In_CIC* in Omni-Channel.
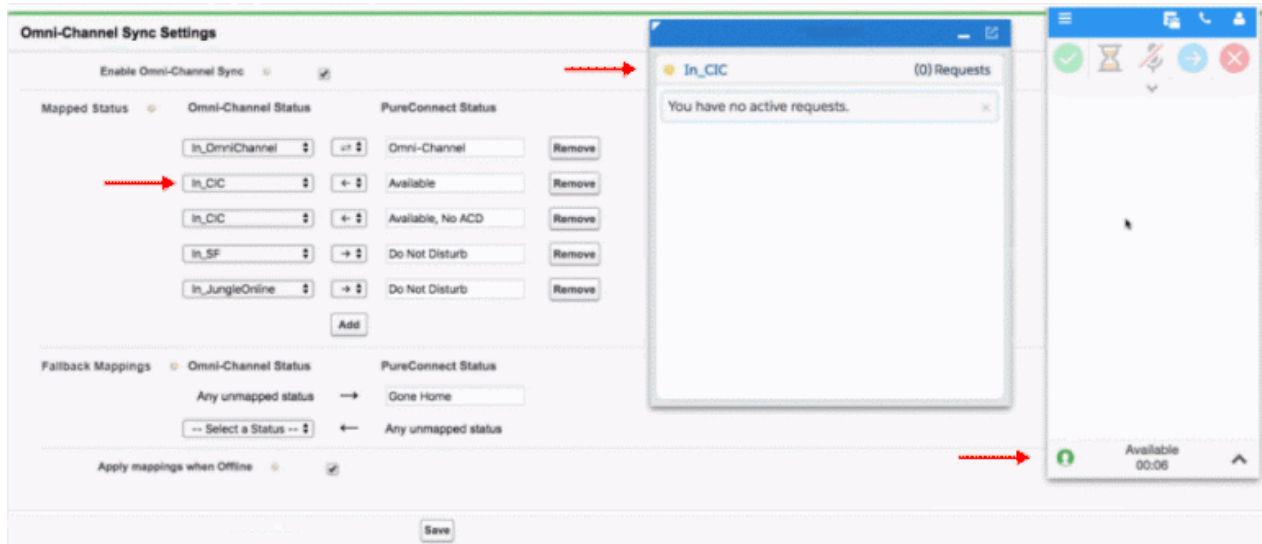
5. In the **Fallback mappings** section, define status mappings for situations not covered by Mapped statuses.
   In the previous example, any time agents change their **Omni-Channel status** to something **not mapped** or mapped only as an **incoming map** (*In_CIC*), their status is set to *Gone Home* in PureConnect for Salesforce.

6. To continue to use these status mappings when the agent is **not logged in to Omni-Channel**, select the **Apply mappings when Offline** check box.
7. Click **Save**.

Configure keyboard shortcuts

Several custom keyboard shortcuts are available in PureConnect for Salesforce to make navigating the softphone easier. To take advantage of them, add the custom keyboard shortcuts to Salesforce.

- Open/close the softphone
- Pick up an interaction
- Place an interaction on/off hold
- Mute/unmute an interaction
- Disconnect an interaction
- Set agent status to Available
- Open the dial pad
- Open the call log
- Open the interaction view

Note: These keyboard shortcuts only work when running Salesforce in Service Cloud® mode, where the softphone is a detachable overlay on the page.

Set up Salesforce keyboard shortcuts

Keyboard shortcut example

Set up Salesforce keyboard shortcuts

Prerequisite: To create custom keyboard shortcuts, follow the Salesforce instructions. See Customize Keyboard Shortcuts for a Salesforce Console.

1. For each keyboard shortcut you create, assign any values that make sense for your organization for the **Console Action**, **Key Command**, and **Description** fields.

   Tip: When assigning Key Commands, avoid those commands already used in Salesforce for default keyboard shortcuts.

2. Assign the **Console Event Name** that corresponds to the appropriate keyboard shortcut. The string must match exactly what this table lists.

Action	Console Event Name
Opens or closes the softphone window.	inin.salesforce.constants.consoleevent.togglectidisplay
Picks up any non-connected interaction. Salesforce ignores this shortcut for more than one non-connected interaction.	inin.salesforce.constants.consoleevent.pickup
Places an interaction on or off hold. Salesforce ignores this shortcut for more than one interaction.	inin.salesforce.constants.consoleevent.togglehold
Mutes or unmutes an interaction. Salesforce ignores this shortcut for more than one interaction.	inin.salesforce.constants.consoleevent.togglemute
Disconnects any connected interaction. Salesforce ignores this shortcut for more than one interaction.inin.salesforce.constants.consoleevent.disconnectSets agent status to Available.	inin.salesforce.constants.consoleevent.setavailable
Opens the softphone and navigates to the dial pad.	inin.salesforce.constants.consoleevent.opendialpad
Opens the softphone and navigates to the call log.	inin.salesforce.constants.consoleevent.opencalllog
Opens the softphone and navigates to the interaction view.	inin.salesforce.constants.consoleevent.openinteractionlist

3. Click **Save**.

   When finished, your custom keyboard shortcuts look similar to the screenshot, where the Console Event Names match exactly what is in the previous table.

Keyboard shortcut example

This example uses a custom keyboard shortcut of 1, configured to open or close the softphone.

1. From any page of the Service Cloud® console, press **ESC** to activate keyboard shortcuts.
   An orange border flashes around the border of the screen to indicate that the shortcuts are active.

   Note: If your cursor is active on the softphone itself, keyboard shortcuts do not work.
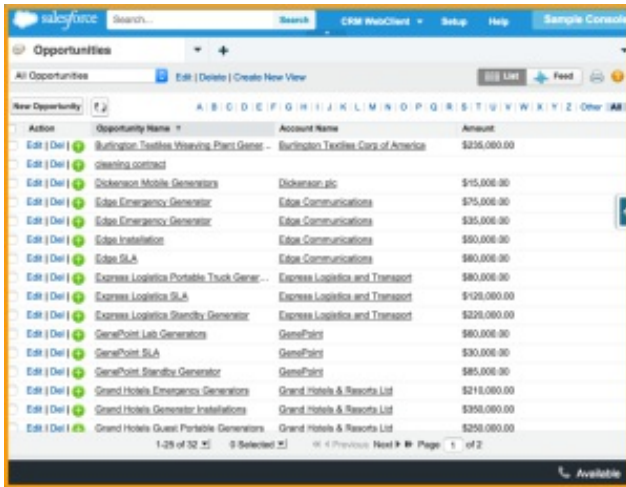
2. Press **1** to open the softphone.
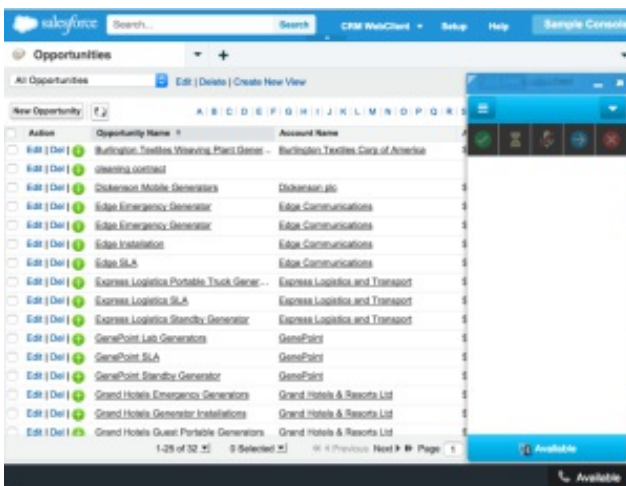
3. Press **Esc**, then **1** to close the softphone.

Set up Salesforce keyboard shortcuts

Configure Custom Buttons

> **Requirements**: Users need the appropriate **Client Buttons: View** Access Control right to see selected custom buttons in the CIC client. Users need the **Customize Client** Security Right to rearrange buttons in the PureConnect for Salesforce interface.

You can configure the behavior and appearance of custom buttons for the PureConnect for Salesforce softphone and queue views. Custom buttons can invoke a handler or open a webpage. Custom buttons can apply only to selected interaction types. This setting enables a queue-based custom button only when a user selects one of the correct interaction types in the queue view.

[Client Button Configuration](#)

[Assign Client Button Rights](#)

[Customize Toolbar](#)

Client Button Configuration

The custom buttons you configure in Interaction Administrator can appear in Interaction Desktop, Interaction Connect, and the PureConnect for Salesforce integration. Certain limitations apply, so be aware of the following:

- Custom buttons that invoke a **handler** work in all CIC clients.
- Custom buttons that invoke an **add-in** work only in Interaction Connect.
- Custom buttons that start a **local application** work only in Interaction Desktop.
- Custom buttons that open a **URL** work only in PureConnect for Salesforce and Interaction Connect.

To configure a custom button:

1. In Interaction Administrator, select **People** > **Client Buttons**.
2. In the Client Buttons container, right-click and select **New**.
3. In the **Entry Name** dialog box, enter a name for this custom button. Click **OK**.
   Result: The **Client Button Configuration** dialog box opens.

4. Complete the general settings:

Label	Description
Text	Optionally, you can edit the text appearing here. **Note**: Interaction Desktop and Interaction Connect use this text as a label for the custom button. PureConnect for Salesforce custom buttons do not have labels.
Active	To enable this custom button to appear in PureConnect for Salesforce, select this check box.
Description	Supply text for the tooltip displayed the user points to the button.
Icon	To select an icon for the custom button, click **Change Icon**. Locate and select an ICO file.

5. Complete the **Availability** settings.

Label	Description
Enabled	Select when the button is enabled: • The default option is **Always**. Always makes the custom button available in any interaction's right-click shortcut menu. • **Interaction Selected** or **Active Interaction Selected** options affect only the queue tool bar. An interaction form represents only one interaction, which is assumed to be the *selected* interaction. PureConnect for Salesforce does not show interaction forms for inactive interactions. An active interaction is any interaction that is not in the disconnected state.
Deactivate after one use per interaction	Select this check box is you want the button unavailable after the first-time use per interaction.
Location	Select where the button appears. The options are **Queue** (queue toolbar), **Interaction Form**, or **Both**. **Note**: Interaction Connect ignores this setting. Interaction Connect does not have interaction forms with buttons. Custom buttons automatically show up on Queue views for all CIC clients.
Interaction Types	Select the check box for each interaction type for which the button is enabled. Select "**All**" if the button is enabled for every interaction (depending on the option chosen for the **Enabled** setting). **Note**: Setting **Enabled** to **Always** automatically selects **All** for Interaction Types and selects and disables the check boxes for every interaction type. In Interaction Desktop, if you select only certain interaction types, the button is available only on those interaction type forms (if you set **Location** to "Interaction Form" or "Both"). Also it is enabled only when an interaction of the selected types is in the queue (depending on the **Enabled** and **Location** settings).

6. Complete the **Action** settings.

   Use the options in this section to define what action happens when a user clicks the custom button.

Label	Description
Handler Notification	To send a notification to start a custom handler, select this option. This option passes to the handler the selected interaction's ID (if any), the ID of the user who pressed the button, and the station where the user made the request. The handler then performs the required action as customized.
Add-In Notification	Custom buttons for add-in notifications work only in Interaction Connect.
Launch Application	Custom buttons for launching an application work only in Interaction Desktop.
Open URL	When an agent clicks this custom button, it opens the webpage in a separate browser window. To insert an interaction attribute into the URL, click the **Plus** button. **Note**: This parameter could pass an interaction ID to a CRM. This parameter does not support starting or running an application. Other than the URL, it does not support any other strings.
User Notification	To display a toast indicating that the user clicked the custom button, select this check box.

7. To save the custom button, click **Apply,** then click **OK**.
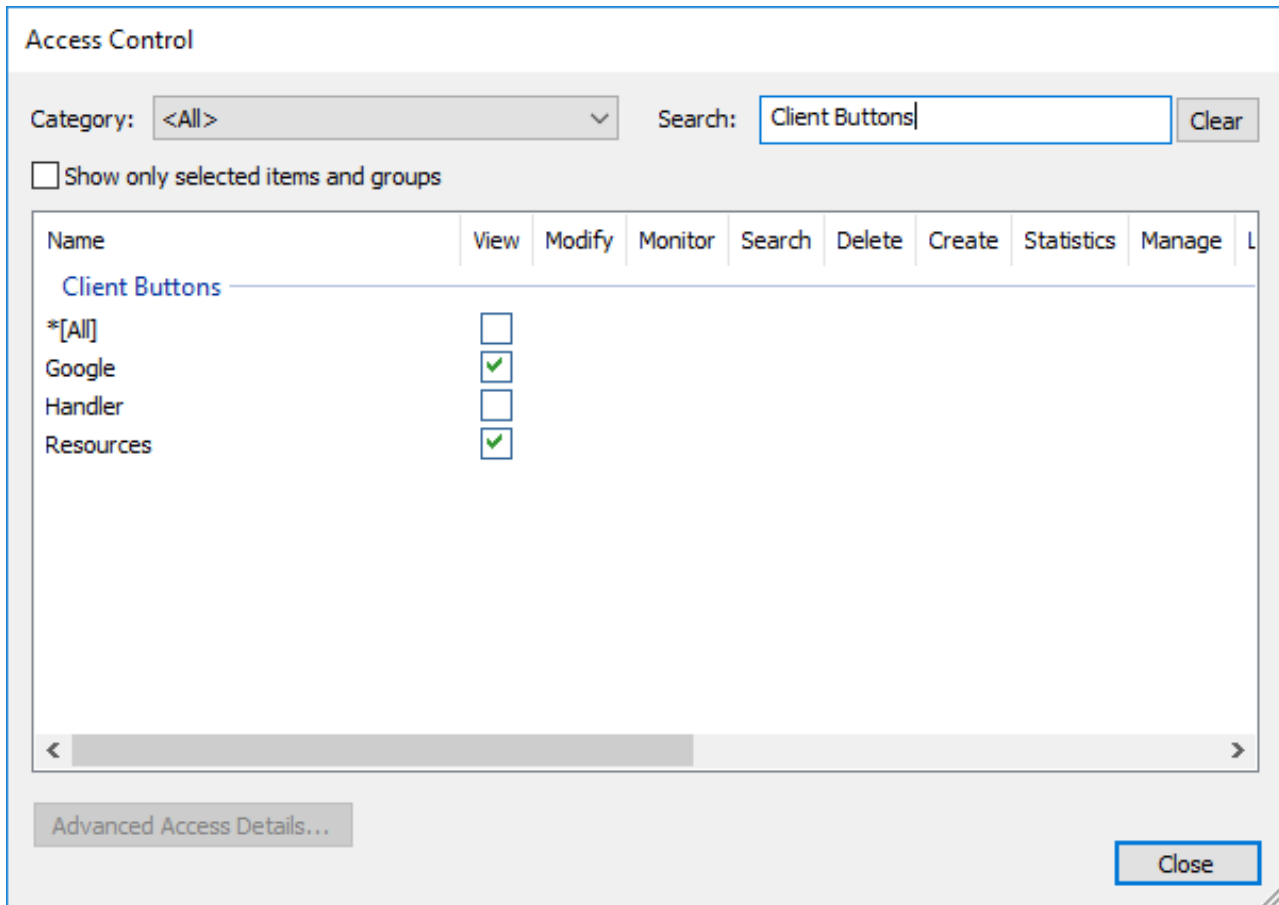
Assign Client Button Rights

A user needs the appropriate Client Button Access Control right before a custom button can appear in the PureConnect for Salesforce interface.

To assign the client button right:

This example is for assigning rights to users. You can also assign Access Control rights to roles and workgroups.

1. In Interaction Administrator, select **People** > **Users**.
2. Select the appropriate user.
3. In the User Configuration dialog box, click **Access Control**.
4. In the **Search** text box, type Client Buttons.

5. Select the check box in the **View** column for each button you want displayed.

   Note: View settings affect all CIC clients for the selected user, role, or workgroup.

6. Click **Close**.
   Result: The client automatically reflects changes. The user does not need to log off and then back on.

Customize Toolbar

Uses can customize the arrangement of toolbar buttons in the PureConnect for Salesforce softphone.

To customize the softphone toolbar:

1. Click the **Customize Toolbar** control in the toolbar.
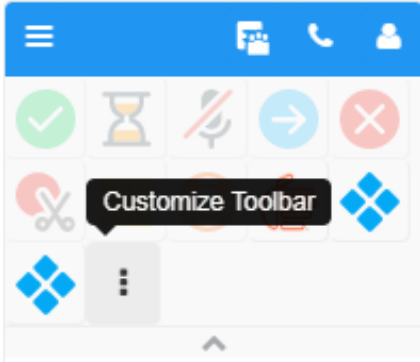
2. In the **Customize Toolbar** dialog box, do the following:
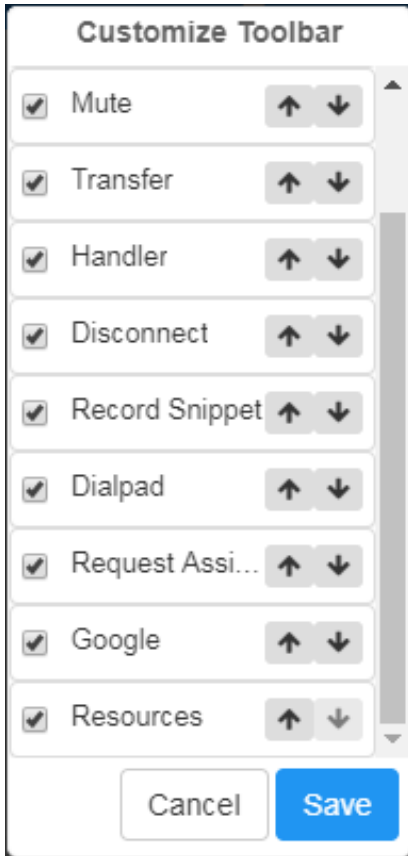
- Select the check boxes for the buttons you want to display.
- Clear the check boxes for buttons you want to hide.
- Use the **Up** and **Down** arrows to arrange the buttons.

- Click **Save**.

Screen pop

A screen pop is a window or dialog that appears automatically and displays information for the current call.

[Default screen pop behavior](#)

[Screen pop a Salesforce page](#)

[Screen pop multiple pages](#)

[Screen pop a Salesforce search result](#)

Default screen pop behavior

The default screen pop behavior in PureConnect for Salesforce is to pop based on an ANI.

If an inbound ANI includes a +1 prefix (+13175551212), PureConnect for Salesforce removes the prefix before searching Salesforce for the number (3175551212). To pass the full ANI with a +1 prefix, create a SF_SearchValue attribute and set the value of the attribute to Eic_RemoteTnNormalized.

> **Note**: By default, screen pops do not occur for outbound calls. You can enable screen pops for outbound calls by setting the server parameter **SF_PopOutboundCalls** to "true". This enables screen pops for outbound calls based on the "Inbound" softphone layout settings configuration. Each agent needs to refresh the web page containing the PureConnect for Salesforce Softphone after the administrator makes this change to the server parameter.

Screen pop a Salesforce page

The integration uses the SF_URLPop custom call attribute to screen pop a specific Salesforce page for certain calls. The screen pop could be a standard Salesforce page, a Visualforce page, or a new record page with pre-populated data from the caller's input. This example uses a Visualforce page. If a new customer calls, that call screen pops a Visualforce page to the agent.

> **Note**: See *Format Salesforce URL for new record screen pop* for a more advanced example of pre-populating a new record page as part of the screen pop.

> **Tip**: The following procedure relies heavily on CIC configuration. For more information, see the [Interaction Attendant](#) or [Interaction Designer](#) documentation in the PureConnect Documentation Library.

1. Create custom attributes in any of the following applications:
   - Interaction Attendant
   - Interaction Designer / custom handlers

   > **Note**: This example uses the Set Attribute operation in Interaction Attendant. The information used to set the attribute on the call can come from multiple different places: data dip, caller data entry, workgroup information, a static URL, or a combination of other interaction attributes.

2. Set the **Attribute** to **SF_URLPop**.
3. Set the **Value** to a relative link for the Salesforce page that displays when an incoming interaction contains this custom attribute.
4. In this example, the value is a custom Visualforce page, apex/CustomPage.

Salesforce.com screen pop for SF_URLPop

Set Attribute - Set an attribute/value pair for this interaction

Node Characteristics

Name: Salesforce.com screen pop for SF_URLPop

Digit: <None>

☑ Active

☑ Default Action

☐ Add entry to the Interaction Log

Configure Speech Recognition...

Attribute: SF_URLPop

Value: apex/CustomPage

Action When Finished

○ Go back to the previous menu

○ Disconnect

○ Transfer to Operator Processing

● Jump to a custom location

Transfer to saleforce workgroup

5. Publish this configuration.

When a call comes in to this Interaction Attendant profile, CIC assigns the custom call attribute of SF_URLPop with a value of apex/CustomPage, which screen pops the custom Visualforce page.
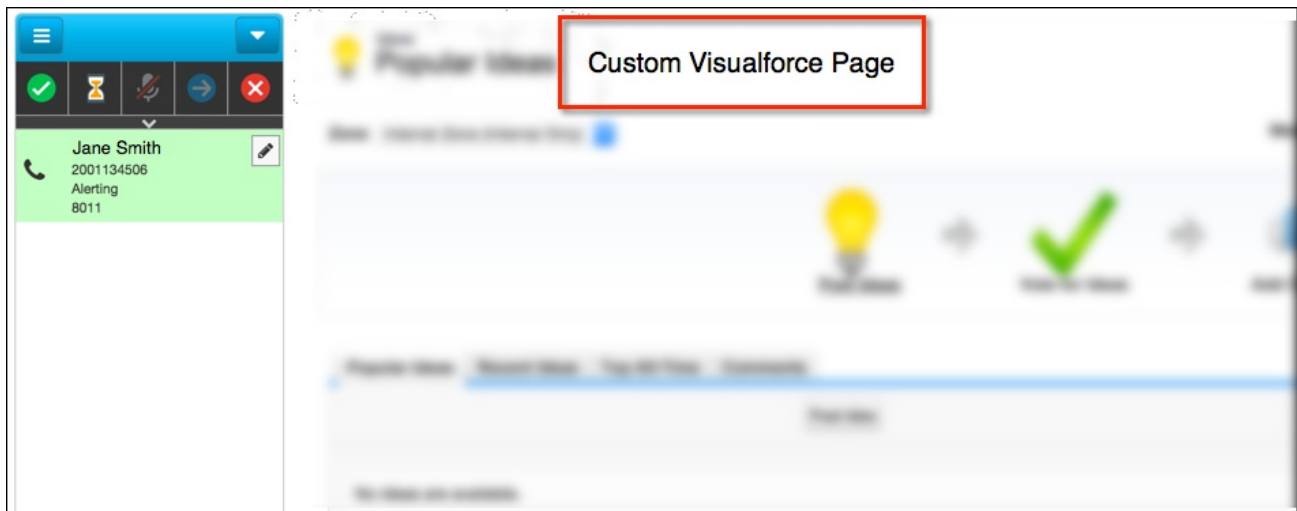
Screen pop multiple pages

The ability to display multiple pages in a single screen pop is still available in the PureConnect for Salesforce integration. However the configuration is different from the way you configure screen pops in the Salesforce Web Client integration. The older integration piped multiple URLs to the SF_URLPop attribute, PureConnect for Salesforce uses the SF_URLPopSubTabs attribute for more URLs.

1. Set SF_URLPop to the URL for the first (primary) screen pop.
2. Set SF_URLPopSubTabs to the additional subtabs associated with the primary URL.

> **Note**: Piping does work with this attribute. If any tabs include external URLs, add these external URLs to the console's whitelist so that they display correctly.

Screen pop a Salesforce search result

The integration uses the SF_SearchValue custom call attribute to screen pop a Salesforce search result for certain calls. The search can be for a case number, phone number, contact name, and so on. The behavior for no matching records or multiple matches respects screen pop settings defined in the Softphone layout in Salesforce. This example uses a customer case number. If a customer calls about an existing case, the incoming call screen pops the case record to the agent.

> **Tip**: The following procedure relies heavily on CIC configuration. For more information, see the Interaction Attendant or Interaction Designer documentation in the PureConnect Documentation Library.

1. Create custom attributes in any of the following applications:
   - Interaction Attendant
   - Interaction Designer / custom handlers

   > **Note**: This example uses the Set Attribute operation in Interaction Attendant. The information used to set the attribute on the call can come from multiple different locations: data dip, caller data entry, workgroup information, a static value, or a combination of other interaction attributes.

2. Set the **Attribute** to **SF_SearchValue**.

3. Set the **Value** to the value searched in Salesforce when this custom attribute is defined on an incoming interaction.

   > **Note**: Use this value to search for matching records in Salesforce. Examples include phone number or account number.

   In this example, the value is the case number, 00001007.

Salesforce.com screen pop for SF_SearchValue

Set Attribute - Set an attribute/value pair for this interaction

Node Characteristics

Name: Salesforce.com screen pop for SF_SearchValue

Digit: `<None>`

☑ Active
☑ Default Action
☐ Add entry to the Interaction Log

Configure Speech Recognition...

Attribute: SF_SearchValue

Value: 00001007

Action When Finished
○ Go back to the previous menu
○ Disconnect
○ Transfer to Operator Processing
◉ Jump to a custom location

Transfer to Salesforce Workgroup

4. Publish this configuration.

When a call comes in to this profile, Interaction Attendant assigns a value of 00001007 to the SF_SearchValue custom call attribute. Once routed to an agent, the alerting call screen pops the case in Salesforce.

Format Salesforce URL for new record screen pop

This article describes how to format the value of a SF_URLPop custom call attribute to screen pop a new record in Salesforce, pre-populated with caller data. This example uses a Salesforce New Contact, but you can use this same approach to screen pop and pre-populate literally any Salesforce record.

Warning! The technique described in this article is based on the URL format used in Salesforce's standard (Classic or Console)

55

Identify the URL

Each record in Salesforce uses an exact URL code. Creating a contact results in this URL: https://na5.salesforce.com/**003/e**. The **003** is a three-character code for contacts. The **e** identifies the contact as a new record.

The first portion of the URL (https://na5.salesforce.com) could look different in your environment. The value of a custom call attribute only needs the portion that follows the main URL, for example, **003/e**.

> **Note:**
>
> When using "SF_UrlPop" the value may be the full Salesforce URL of the page. Use only the part after https://<lightning.domain.com>/ in the URL, or the Salesforce Object ID.
>
> For more information about Lighting URL structure, see the:
> - Developer's Blog announcing the change
>   https://developer.salesforce.com/blogs/2018/01/heres-need-know-new-url-format-lightning.html.
> - Knowledge Article
>   https://help.salesforce.com/articleView?id=FAQ-for-the-New-URL-Format-for-Lightning-Experience-and-the-Salesforce-Mobile-App&language=en_US&type=1

Fill out new record data

Once you have identified the URL for a new contact, you can define the fields that you want to pre-fill with data. To get the exact field names from Salesforce, use the developer tools in your browser. These steps use developer tools to identify the First Name and Last Name field names. In this example, the exact field names are name_firstcon2 and name_lastcon2.

1. To display the HTML code for the New Contact page, right-click the webpage, and then click **View Source** or **View Page Source**.
2. Find the exact field names by searching for the exact label text from the New Contact record, in this case **First Name** and **Last Name**.

```
<label for="name_firstcon2">First Name</label>
```

```
<label for="name_lastcon2">Last Name</label>
```

Format the URL

Create the URL by combining the relative URL with the field names and values, as described in this table.

Format element	Description
<object code>/	Relative URL of the Salesforce object to screen pop.
e?	e indicates a new record; ? indicates that pre-filled values follow in the URL.
<field name X>= <field value X>	Zero to many fields with prefilled values can be sent on the URL. Delimit each field name/value pair with an ampersand (&). This portion of the URL must be HTML-encoded. You can use the Escape URL handler tool step to escape this portion of the string.

```
object code>/e?<field name 1>=<field value 1>&<field name 2>=<field value 2>
```

Example

The URL in this example would be: **003/e?name_firstcon2=John&name_lastcon2=Wilson**

> **Note**: This example uses Interaction Attendant to set the attribute. The information used to set the attribute on the call can come from multiple different places: data dip, caller data entry, workgroup information, a static URL, or a combination of other interaction attributes. For more information, see the Interaction Attendant documentation in the PureConnect Documentation Library.

1. Create a new profile in Interaction Attendant.
2. Add a **Set Attribute** operation to the profile.
3. Set the Attribute to SF_URLPop.
4. Set the **Value** to a relative link for the Salesforce page that displays when an incoming interaction contains this custom attribute. In this example, the value is a new contact URL, appended with input data, **003/e? name_firstcon2=John&name_lastcon2=Wilson**.

5. Publish this configuration.

   When a call comes to this profile, Interaction Attendant assigns the value of 003/e? name_firstcon2=John&name_lastcon2=Wilson to the custom call attribute SF_URLPop. Once routed to an agent, the alerting call screen pops a Salesforce New Contact record with John Wilson in the First Name and Last Name fields.

Advanced customization

The following customization features are available in the PureConnect for Salesforce integration:

Enable click-to-dial on Visualforce pages

Create custom interaction logs

Use the Salesforce activity record ID in CIC

Implement Integration Console Events

Enable click-to-dial on Visualforce pages

The PureConnect for Salesforce integration enables click-to-dial functionality on default Salesforce pages, such as contact or account pages. When an agent clicks a phone number on default Salesforce pages, the integration automatically dials the phone number. PureConnect for Salesforce populates the Name and Related To text boxes with the relevant objects from these Salesforce pages.

You can also provide click-to-dial functionality on custom Visualforce pages by adding the click-to-dial component to these pages.

The following is an example that uses the click-to-dial component on a Visualforce page and pulls data from Salesforce using an Apex controller. See the Salesforce documentation for information about the click-to-dial component and Apex JSON.

Click-to-dial component

The click-to-dial component adds the click-to-dial functionality to a custom Visualforce page and allows you to assign attributes for entityId and params. entityId and params pull data from the Apex controller to populate the Name and Related To text boxes in PureConnect for Salesforce and to auto-associate with an activity on a Salesforce page.

```
<apex:page standardController="Account" extensions="CustomClickToDialController" showHeader="true">

<support:clickToDial number="3172222222" entityId="{!id}" params="{!json}"/>

</apex:page>
```

- number: the number to be dialed
- entityId (optional): the ID of a relevant object such as a contact or an account to auto-associate with an activity
- params (optional): a JSON string for a single object or an array of objects to auto-associate with an activity
  Use the following format for the params attribute:

```
{
"Id": "00AB0000001C2dE",
"Name": "John Smith",
"attributes": {
"type": "Contact"
}
}
```

The Salesforce JSON.serialize API uses this format to serialize objects such as contact and account.

> **Note**: Although entityId is only for a single record, by using params you can add more records to Name and Related To in the call logs. For more information about this component, see the Visualforce Developer Guide.

Apex controller

The Apex controller retrieves backend data from Salesforce, generates JSON strings using the Salesforce JSON.serialize API, and adds this data as the values for the entityId and params attributes in the **click-to-dial component** on custom Visualforce pages.

```
public class CustomClickToDialController {

public CustomClickToDialController(ApexPages.StandardController stdController){}

// Returns an ID of a Who/What record (for the entityId attribute).

public String getId(){

Contact = [SELECT id, name FROM Contact LIMIT 1];

return contact.id;

}

// Returns a JSON string representation of Who/What record(s) (for the params attribute).

// It could be a single Who/What record or a list of Who/What records.

public String getJson(){

Account = [SELECT id, name FROM Account LIMIT 1];

return JSON.serialize(account);

}

}
```

All returned "Who" records appear in the Name drop-down list in the call log. If the Apex controller returns only one "Who" record, it auto-associates this record with the Name text box in the call log.

All returned "What" records appear in the Related To drop-down list in the call log. If the Apex controller returns only one "What" record, it auto-associates the record with the Related To text box in the call log.
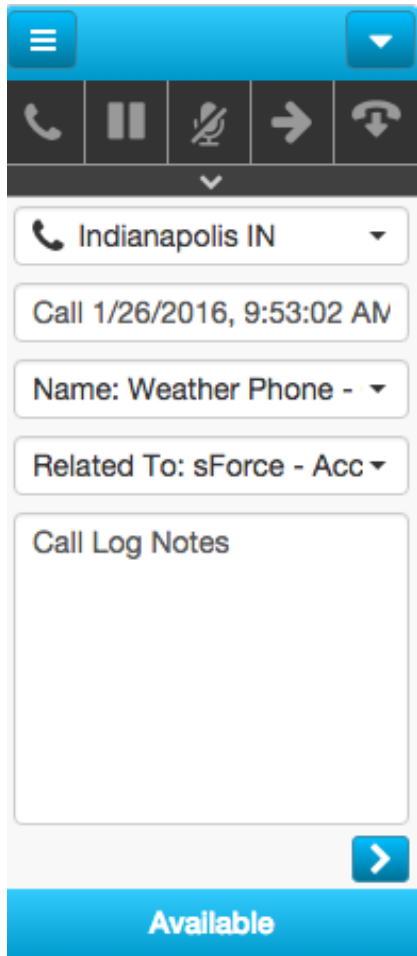
Create custom interaction logs

The following Salesforce CTI methods are available for developers to customize Visualforce-based interaction logs to track conversations with customers. These methods are available only in Service Cloud®.

- getCallAttachedData()
- getCallObjectIds()
- onCallBegin()
- onCallEnd()

More resources

- See [Salesforce developer documentation](#) for instructions on how to call these methods.
- See the [Salesforce blog](#) for an article on building custom interaction logs.
- Here is a [sample Visualforce page](#) that uses these methods to create custom interaction logs in the Service Cloud console.

Use the Salesforce activity record ID in CIC

If the Apex controller returns only one "Who" record, it auto-associates this record with the Name text box in the call log. Use this custom call attribute to do the following:

- Display the ID in CIC reports for quick access to the Salesforce activity record.
- Create seamless backend integration extensions, such as post-call surveys that update the results in Salesforce.

Implement Integration Console Events

> **Warning**: The implementation of console events is reserved for Genesys PSO use only.

Salesforce Console Events enable other console components (VisualForce ones) to respond to and act on things such as:

- Handler notifications
- Watching the queue
- See which interaction is selected
- Setting interaction attributes

Console events can trigger an action such as playing a chime when specific events occur. For example, two console events occur when an interaction is auto-answered by an agent. These events have parameters tied to the event, reason, and interaction ID.

Event Name: AUTO_ANSWER_ACD_INTERACTIONS

Body Example:

```
{
"message": {
"reason": "auto_answer_acd_interactions", "interactionId": "1001530936"
}
}
```

Event Name: AUTO_ANSWER_NON_ACD_INTERACTIONS,

Body Example:

```
{
"message": {
"reason": "auto_answer_non_acd_interactions", "interactionId": "1001530937"
}
}
```

PureConnect for Salesforce Integration FAQs

Here are the answers to some of the most frequently asked questions about the PureConnect for Salesforce Integration.

What is the Salesforce API average call rate in PureConnect for Salesforce?

Salesforce API usage differs between Sales Cloud and Service Cloud. In Sales Cloud, the integration makes one call per user per tab per page refresh to the Salesforce API. In Service Cloud, the integration makes one call per user per tab to the Salesforce API.

Why is a different interaction or call log sometimes selected after a page refresh in the Salesforce integration?

When you have multiple interactions on your queue, and the page refreshes, the connected interaction is always selected, regardless of what was selected before the refresh. If all interactions on your queue are disconnected but still visible, the first (oldest) interaction is selected. To select a different interaction, go to the Interaction view and click a different one.

Why do I see a logon screen with no logon options?

If you see a logon screen but no logon options in PureConnect for Salesforce, you may have enabled single sign-on (SSO) in the call center definition file but not in CIC.

- In Interaction Administrator, go to **System Configuration > Configuration > Connection Security tab > Configure logon authentication** link. Enable **Allow Single Sign-On authentication**.
- For Windows authentication, enable **Allow manual entry of Windows authentication credentials**. For CIC authentication, enable **Allow IC authentication**.

How do I force station logoff after a fixed period of inactivity?

Select the **Prevent station logout on navigation** option in PureConnect Call Center settings. For more information, see Manage the call center settings.

Also, in Interaction Administrator, add the optional General Server parameter, **INDEPENDENT_STATION_TIMEOUT** and specify a valid time in minutes. This forces CIC stations to log off the PureConnect for Salesforce integration when CIC does not detect any agent activity during the specified period.

> **Note**: To enforce a timeout, CIC requires both this setting and the server parameter. This option requires CIC 2017 R3 Patch 8 or later. This parameter does not affect Interaction Connect or Interaction Desktop.

Why aren't certain status icons appearing?

The CIC administrator configures status icons in Interaction Administrator. If you aren't seeing one or more statuses that you are expecting in PureConnect for Salesforce, check the configuration in Interaction Administrator.

How does PureConnect for Salesforce behave in a server switchover situation?

If the primary and backup CIC servers share a DNS name, CIC logs the agent off, but the agent can immediately log back on.

Otherwise, CIC logs the agent off and the agent must specify the new server name at the time of logon or in the call center definition file. See *Set up a call center for PureConnect in Salesforce*, for instructions on editing the call center definition file.

Salesforce Object Routing Server

If the SORS instance process is terminated or killed, Windows automatically starts the SORS service. All the CIC server workgroups with the ACD email routing flag set to True will subscribe after the successful connection to the Primary IC server. The Salesforce

Object Routing Server supports Off-Host Session Manager and Switchover environments.

The SORS does not re-route lost interactions after a switchover event. This functionality is achieved through Interaction Recovery Service (IRS) and must be in place for email interactions. To enable IRS for email interactions, see Recovery of email interactions in the Automated Switchover Technical Reference.

When the SORS instance starts, it logs in to the CIC server and Salesforce. Then it scans the Salesforce object routing table for un-routed Salesforce case objects and processes the unrouted cases.

Salesforce Object Routing Connector

The Salesforce Object Routing Connector does not re-route lost interactions after a switchover event. This functionality is achieved through Interaction Recovery Service (IRS) and must be in place for email interactions. To enable IRS for email interactions, see Recovery of email interactions in the Automated Switchover Technical Reference.

What reporting data does a Salesforce Activity record include for past interactions?

The integration creates a call log for each interaction and stores the following details on the Salesforce Activity record:
- **Created By**: Name of Salesforce agent and the date and time the call started.
- **Subject**: Default is the interaction type (for example, call) and the date and time. The agent can edit the subject.
- **Name**: The associated "who" record in Salesforce.
- **Related To**: The associated "what" record in Salesforce.
- **Comments**: Free form comments included in the call log.

Which Salesforce objects can you associate to the call log?

You can associate up to two Salesforce objects to the integration's call log, one "who" and one "what" record. Salesforce "who" records are contacts and leads; "what" records are accounts, opportunities, campaigns, cases, or custom objects. As the agent navigates through Salesforce while the call is live, PureConnect for Salesforce dynamically adds those records to the call log drop-down lists.

Can a screen pop create a new Salesforce record?

Yes. If PureConnect for Salesforce searches Salesforce for a record that matches the incoming ANI and doesn't find a matching record, a screen pop can create a new record. For more information, see *Format Salesforce URL for new record screen pop*.

What happens to the screen pop if the ANI matches multiple Salesforce records?

The Salesforce softphone configuration supports numerous configuration options around screen pop. If the ANI matches multiple records, Salesforce can pop a search page showing the matches, pop nothing, or pop to a Visualforce page.

When does the screen pop occur in Salesforce?

The screen pop occurs when the call is first added to the user's queue if it is ringing or connected. This behavior is not configurable.

Which Salesforce API does the CRM integration use?

The CIC integration with Salesforce is based on the Salesforce Open CTI APIs, which are what Salesforce currently supports. The integrations do not use the CTI Toolkit which has reached end of support with Salesforce.

Troubleshooting the PureConnect for Salesforce Integration

Emails stop routing

Push Notifications for the Salesforce Console do not work after deploying the Salesforce Console app in the target org or in a refreshed sandbox. For more information and a solution, see Email interactions stop routing in the SalesForce Object Routing Server help.

Connection issues

Description of error	Cause	Resolution
You are kicked out of PureConnect for Salesforce and returned to the logon page, you see this error: "Your connection to the server was lost. Please try again."	Lost network connection	Check the Internet connection on your computer or reset your router. Contact your IP provider or IT department if you are still experiencing network issues.
	Slow network or proxy	If your network connection or your proxy is too slow, the connection times out and logs you off the application.
	Server switchover occurred	If using the default IC logon (not SSO), CIC logs you off whenever a server switchover occurs. Log on again to start a new session.
	Side-by-side logon to CIC client without running a second CIC server	If you log on to the CIC client after selecting a station in PureConnect for Salesforce, PureConnect for Salesforce kicks you off, and you must reenter your password. To avoid this problem in the future, configure a second CIC server in the call center definition for switchover. Or, log on to the CIC client first.
Session expired due to inactivity	If you navigate away from PureConnect for Salesforce for an amount of time that exceeds the time out on the CIC server, CIC logs you off. Log on again to start a new session.	
You cannot log on at all, and you see this error: "Unable to retrieve single sign on settings."	SSO is unavailable in CIC	Ask your CIC system administrator to enable SSO, even if you only have one identity provider.
Credential pop-up is not displaying	Your browser blocks pop-ups	Always allow pop-ups for this site.
	You are on an unsupported version of CIC	Ensure that you are running the latest patch of CIC 2015 R2 or later release.
After entering credentials, the authentication pop-up goes blank and never logs you off.	Reverse proxy domain is different from CIC domain	Add a custom reverse proxy route to your web proxy.
You see a blank logon screen with no logon options.	SSO identity providers are not enabled in CIC	In Interaction Administrator, go to System Configuration > Configuration > Connection Security tab > Configure logon authentication link. Enable Allow single sign-in authentication. For Windows authentication, enable Allow manual entry of Windows authentication credentials. For CIC authentication, enable Allow IC authentication.
Enabling Push Events in the Call Center Settings tab causes various functionality issues after logging on to PureConnect for Salesforce.	PureConnect for Salesforce uses Server-Sent Events as the push events mechanism and incorrect reverse proxy settings can prevent these from being proxied correctly.	For IIS-based reverse proxies (version 7+), ensure that the Response buffer threshold setting of the Application Request Routing Cache module is set to 0. See the steps for enabling response buffering in the CIC Web Applications Installation and Configuration Guide.

Change Log

Date	Changes
15-July-2016	Converted PureCloud Resource Center administrator's content to the PureConnect for Salesforce Administrator's Guide available in the CIC Resource Center.
18-July-2016	Updated introduction to Chapter 2: How to migrate to PureConnect for Salesforce. Clarified description of Desktop integration and Web integration status and support.
03-August-2016	Minor edits to Chapter 8, FAQs section.
17-August-2016	Added Push Events to Chapter 8, Troubleshoot connection issues section.
15-September-2016	Added note to Set up Screen pops bullet point about using 'key' parameter in Chapter 2, How to migrate to PureConnect for Salesforce.
20-October-2016	- In Language support section, added Spanish (es) and French (fr). - In Troubleshoot connection issues section, removed note from description of Session expired due to inactivity
29-November-2016	In Administrator Requirements, noted that PureConnect for Salesforce will no longer support Internet Explorer 10 after December 31, 2016.
25-January-2017	In Supported interaction types, added ACD-routed email interactions.
10-February-2017	Updated step 4 in Manage the Call center settings to include /api in the Web Proxy Address. Other minor edits.
28-February-2017	Added Screen pop multiple pages section.
03-April-2017	Updated for support for Salesforce Lightening Experience.
19-April-2017	In Chapter 2, in the Manage the call center settings section, added steps for the Enable Server-sent Events and the Only Save Connected Interactions options.
02-May-2017	In Chapter 1, added Salesforce Object Routing Connector section with reference to additional information in documentation library.
30-May-2017	Corrected step 2 of Install or Upgrade the Managed Package procedure to read: 2. On the first step of the installation, select Install for Admins Only.
13-June-2017	- In the "Migration Steps from Salesforce Classic to Salesforce Lightening" section, added step: 1. Upgrade or verify that your managed package is version 3.6 or higher. This is required for PureConnect for Salesforce Lightening. See Install or Upgrade the managed package. - In the "Enable the Open CTI softphone" section, added note to step 6 below screen capture: Note: Load in background when app opens checkbox must be selected. Clearing this checkbox can cause the phone to not function correctly. - In the "Enable the Open CTI softphone" section, changed value for Icon from "Call" to "call." The value must be lowercase.
07-July-2017	In the "Manage the call center settings" section, documented new settings for Single Sign On: Disable IC Auth, Disable Windows Auth, and Allowed SSO Providers. Also in the same section, documented new setting: Prevent station logout on navigation.

17-July-2017	In the "Manage the call center settings" section, added Warning to step 7. The independent station created by this option does not expire automatically. To force CIC stations to log off the PureConnect for Salesforce integration when CIC does not detect any agent activity during a specified period, you must also add the Interaction Administrator INDEPENDENT_STATION_TIMEOUT General Server parameter and specify a valid time in minutes. To enforce a timeout, CIC requires both this setting and the server parameter. In the FAQs and Troubleshooting section, added: How do I force station logoff after a fixed period of inactivity?
18-September-2017	Added new Chapter 6: Configure Salesforce Omni-Channel Presence Sync.
18-October-2017	Updated Customize interaction details section in Chapter 2: Set up the PureConnect for Salesforce integration. Custom interaction details now control the information displayed in the My Interactions tab in the Email and Chat popup windows.
06-November-2017	Added Emails stop routing to Chapter 10: FAQs and Troubleshooting > Troubleshooting section.

09-November-2017	• Changes as a result of rebranding.
	• Chapter 2: Set up the PureConnect for Salesforce integration.
	   ○ Manage the call center settings section: Updated field names that changed as a result of rebranding and the screen capture.
	   ○ Add a PureConnect Call Center Settings tab in Salesforce section: Updated screen capture.
	   ○ Customize interaction details: Updated screen capture of Chat Details attributes.
	   ○ Migrate to a new call center definition: Updated screen capture of All Call Centers.
	   ○ Populate the PureConnect Call Center Settings tab: Updated screen capture of Call Center settings.
	   ○ Move users to the new PureConnect for Salesforce Lightning Call Center: updated screen captured of Call Center selection and All Call Centers.

16-October-2017	Added section: Integration Console Events in Chapter 9: Advanced Customization.
18-October-2017	Updated Customize interaction details section in Chapter 2: Set up the PureConnect for Salesforce integration. Custom interaction details now control the information displayed in the My Interactions tab in the Email and Chat popup windows.
09-January-2018	Added note that web proxy address is case-sensitive in the Manage the call center settings section in Chapter 2: Set up the PureConnect for Salesforce integration.
01-February-2018	Converted to HTML format.
14-February-2018	Moved "Emails stop routing" information to Salesforce Object Routing Connect help.
25-June-2018	Updated Enable Omni-Channel sync and Map Statuses information. The Omni-Chanel Sync Settings user interface was changed. You can now map multiple pairs of Omni-Channel and PureConnect statuses.
11-July-2018	Updated Enable Omni-Channel sync and Map Statuses information. Default mappings section renamed to Fallback Mappings. Help icons added for Mapped Status and Fallback Mappings.
12-October-2018	Updated Install or Upgrade the managed package information. Changed step 2 to: On the first step of the installation, select Install for All Users or Install for Specific Profiles. Note: If you click Install for Admins only, non-administrators (including agents) may experience degraded performance.
30-November-2018	Corrected statement of IE browser support in Administrator Requirements. Note: PureConnect for Salesforce no longer supported use of Internet Explorer after the release of PureConnect 2018 R5.
06-December-2018	Corrected license requirements in Administrator Requirements by adding: CIC for Salesforce server license.
07-January-2019	Added note to Default screen pop behavior about enabling screen pops for outbound calls.
12-February-2019	Added new section: Configure your softphone layout.
23-April-2019	Reorganized content only, which included combining some topics and deleting others. See https://devjira.inin.com/browse/CICDOC-174 for details.
08-July-2019	Added Note to the "How does PureConnect for Salesforce behave in a server switchover situation?" section of the FAQs topic. This mentions setting up Interaction Recovery Service.

31-July-2019	Cleaned up formatting in some topics, mostly by fixing indentation of Notes, Tips, text and screen captures contained within a step.
16-August-2019	Added Configure Custom Buttons section, including the Client Button Configuration, Assign Client Button Rights, and the Customize Toolbar topics.
24-January-2020	Removed reference to outdated Salesforce integration comparison matrix from the Upgrade from Salesforce Desktop or Salesforce Web topic.
17-March-2020	Finished migrating information from Product Information site.
10-April-2020	Updated for the release of the Salesforce Object Routing Server.
24-April-2020	Fixed link to Salesforce Object Routing Server help in the PureConnect for Salesforce key features topic. Fixed link to Email interactions stop routing in the Troubleshooting topic.
01-May-2020	In the Configure the integration topic, changed Screen pop instruction to: To pass the full ANI with a +1 prefix, create a SF_SearchValue attribute and set the value of SF_SearchValue to the value of the Eic_RemoteTnNormalized attribute.
10-July-2020	Added link to the Salesforce documentation to the Enable the Open CTI softphone topic.
14-July-2020	Updated diagram in the PureConnect for Salesforce Architecture topic.
18-August-2020	In the PureConnect for Salesforce Integration FAQs topic, updated the description of the Salesforce Object Routing Server actions in a switchover situation.
23-September-2020	Updated for Genesys Cloud rebranding.
08-October-2020	Updated diagram in PureConnect for Salesforce Architecture.