

5.8 Oracle Service Cloud Integration Guide

Bright Pattern Documentation

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About

Bright Pattern Contact Center omnichannel cloud call center software integrates with Oracle Service Cloud (formerly called Oracle RightNow) applications to help you drive agent productivity, improve customer experience, and reduce agent load.

Similar to Bright Pattern software, Oracle Service Cloud applications offer talk services, analysis, and reporting. Oracle Service Cloud interfaces directly with Bright Pattern, so that contact centers using the cloud CRM can take advantage of Bright Pattern's features without losing their existing data records and contacts.

This Bright Pattern Contact Center *Oracle Service Cloud Integration Guide* provides instructions for setting up your Bright Pattern Contact Center to function in an integrated manner with your Oracle Service Cloud applications. In addition, this guide offers detailed descriptions of Oracle Service Cloud integration features, including Oracle Service Cloud data-driven interaction routing, the integrated Agent Desktop, screen-pop, activity history, and click-to-call functions.

Features and Benefits

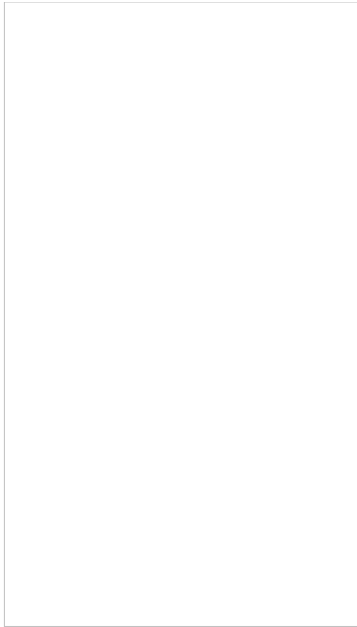
Oracle Service Cloud integration provides everything you need to drive agent productivity, improve customer experience, and reduce agent load.

Drive Agent Productivity

Oracle Service Cloud integration provides an easy-to-use Agent Desktop user interface designed to reduce agent training requirements. Seamless integration with Oracle Service Cloud customer relationship management (CRM) applications means that agents and supervisors are able to use the same Oracle Service Cloud contacts and tools with which they are familiar, through Bright Pattern's efficient, streamlined user interface.

Helpful features:

- One-click dialing with click-to-call capability saves time for both agents and administrators. Because it works out of the box, there is no need to modify forms before getting started.
- Screen-pop functionality saves time as well—customer data is "popped" to the agent's screen, showing all Oracle Service Cloud data associated with the customer. The agent does not need to search the customer's records to learn more about the case or ticket.
- Activity history is displayed front and center, showing agents the context of past conversations with customers. Agents can resolve calls faster when such interaction history and call history is saved, complete with notes, dispositions, and call recordings.
- The integrated Agent Desktop user interface works with USB headsets via a built-in softphone or through any PSTN phone number. Both options can be used by virtual agents working from home.
- Supervisors can track agent performance with real-time supervision tools and historical reports.
- Supervisors can also inform teams about their productivity in real-time with wallboard displays.



Improve Customer Experience

Oracle Service Cloud customer data is pushed to the integrated Agent Desktop, enabling customers to be identified automatically according to their ticket number or any other data saved in Oracle Service Cloud applications. Moreover, customers keep their place in queue, ensuring that priority customers are identified as such and are served faster.

Built-in call and screen recording, monitoring, and grading quality management tools ensure maximum service quality. For example, a customer does not have to repeat information on transfer because the information follows the call through transfers and is saved to the activity history.

To ensure the best service quality possible, agents and supervisors can routinely assess customer satisfaction by using built-in post-transactional surveys attached to both service and agent performance reports.

Reduce Agent Load with Automation

Integration with Bright Pattern also provides access to Bright Pattern scenarios, which automate frequent requests into self-service using Interactive Voice Response (IVR) technology. With call scenarios, customers are prompted to provide information for their case, and their information is used to direct their case to the appropriate agent, voicemail box, or service queue. Administrators can use call scenarios to design custom prompts for any service, while agents can use call scenarios to search, create, and update data in Oracle Service Cloud.

Reduced agent load also means fewer abandoned calls and added convenience for customers. Virtual queuing functionality allows customers to receive a call back at a later time, so they are not waiting on hold endlessly during peak call times. Abandoned calls can be captured in a preview campaign, and customers can be reached later during less busy hours. Customers also have the option to leave a voicemail and receive a call back later.

Oracle Service Cloud IVR example

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Audience

The *Oracle Service Cloud Integration Guide* is intended for the IT and/or technical personnel responsible for the data infrastructure of the contact centers that use Bright Pattern Contact Center solutions for customer interaction processing and Oracle Service Cloud applications for customer relationship management. Readers of this guide are expected to have experience in administration of these systems, as well as a solid understanding of contact center operations and resources that are involved in such operations.

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Scope

The *Oracle Service Cloud Integration Guide* discusses the following aspects of [RightNow integrations](#):

- [Oracle Service Cloud Integration Setup](#)
 - How to Set Up the Integrated Agent Desktop
- [Accessing Oracle Service Cloud Data from Scenarios](#)
 - Configuration
 - Scenario Blocks
- [Integrated Agent Desktop](#)
 - Features
- [Softphone and Click-to-Call](#)
 - Built-In Softphone
 - How to Use the Click-to-Call function
- [Activity History](#)
 - Becoming Familiar with Activity History

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Prerequisites

Oracle Service Cloud integration requires that you have admin-level access to both Bright Pattern Contact Center and Oracle Service Cloud systems.

In addition to access to all regular agent functions, you must have the privilege *Use RightNow*. For more information, see sections [Roles](#) and [Privileges](#) of the *Contact Center Administrator Guide*.

For all types of integration described in this guide, Bright Pattern Contact Center version 3.10 or later is required.

For all types of integration described in this guide, Oracle Service Cloud version May 2015 SP5 or later is required.

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Oracle Service Cloud Integration Setup

When the Bright Pattern Contact Center is integrated with Oracle Service Cloud, your Bright Pattern Agent Desktop is essentially embedded into the Service Cloud environment. From one integrated Agent Desktop interface, you have direct access to Oracle Service Cloud application features such as the phone, live chat, SMS, mobile messenger apps, customer and agent records, interaction details, and more.

How to Set Up the Integrated Agent Desktop

Step 1: Add the Oracle Service Cloud application to your account.

- Submit a request to the vendor for the Oracle Service Cloud Integration package. You will receive a ZIP file titled *OracleRightNow*.
- Log into your Oracle Service Cloud application and go to *Configuration > Site Configuration > Add-in Manager*.
- Click **New**.

[Rightnow-integration-guide-image2.png](#)



Step 2: Begin application installation.

- Navigate to the location where the *OracleRightNow.zip* file is stored.
- Select the file and click *Open*.
- Click **Save** to confirm add-in deployment.

[Rightnow-integration-guide-image3.png](#)



Step 3: Link your Oracle Service Cloud applications to your Bright Pattern profile.

- Click **Profile Access**.
- Select one of the profiles that will use the SP integration. Within this profile, select one of the interfaces that will use the SP integration.

[Rightnow-integration-guide-image4.PNG](#)



For the selected profile/interface combination, define the following parameters:

- **ApUsername** and **ApPassword** – These are the credentials of the account that will be used to create activity history objects

for processed interactions. This can be any existing account with sufficient permissions to create new objects in the Oracle Service Cloud application.

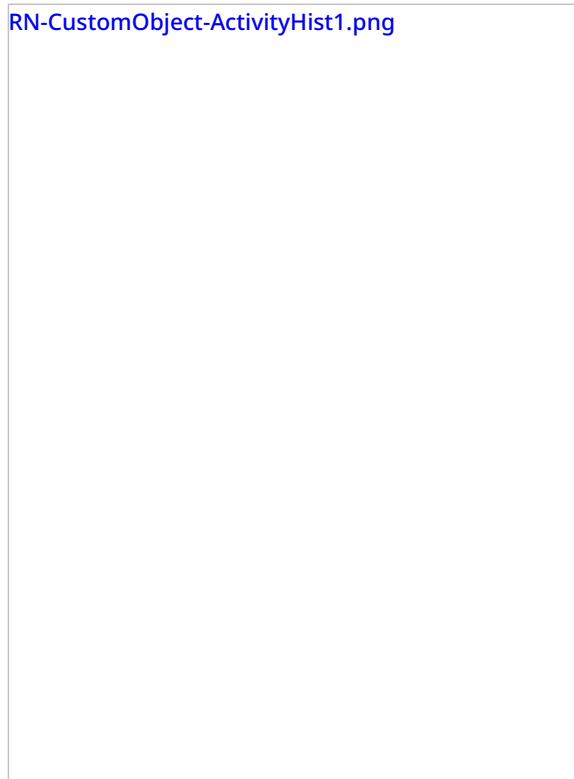
- **Domain** – Domain refers to the Bright Pattern tenant access domain name--the domain name assigned to your contact center at the service provider level. If the domain is specified here, users of the integrated desktop will only need to enter their username and password when logging in. Otherwise, each user will have to enter the domain name manually upon first login.
- **ActivityHistoryObject** – This refers to the name of the custom object that will be used to record activity history for processed interactions. The custom object does not need to exist in Oracle Service Cloud in order to be specified here; it can be created as the next step of this integration procedure (see below). If you do not specify a custom object here, object Task will be used to record activity history.

Note that activity history is a collection of data related to a processed interaction, such as duration, disposition, and recording link. When object Task is used to record activity history, most of these data elements will appear in the general-purpose Notes field of the Task object. The advantage of using a custom object is that it can use a dedicated field for each data element (see below).

Step 4: If necessary, repeat step 3 for other combinations of profiles and interfaces.

Step 5: Define custom objects, if needed.

If you set the **ActivityHistoryObject** to a custom object in the previous step, open the Object Designer and create a custom object with the same name. Select the Predefined Fields and create custom fields for this object setting their names and types exactly as shown in the screenshot below.



Step 6: Specify data types for the objects.

Note that the ID field name (shown at the bottom of the previous screenshot) has data type **Integer**. You must specify the the data type.

As such, the following ID fields' data type must also be set to **Integer**:

- **AccountID**
- **ContactID**
- **IncidentID**

AccountID, IncidentID, and ContactID have data type "Integer"

Step 7: Establish relationships for the objects.

Specify the applicable relationships for all of the ID fields (AccountID, ContactID, and IncidentID).

- Navigate to **Relationships**.
- From the Custom Objects menu (on the left), select the custom object whose relationships you are modifying. The **Object Relationships** properties and a list of interaction records parents will be shown.
- Click the Add icon to specify the associations with accounts, incidents, and contacts by ID field type.
- Click **Apply** to save your changes.

Specify the applicable relationships for all ID fields

Step 8: Make sure fields are nullable.

Navigate back to **Fields**. If the attribute is enabled, the **Field Options** for all field names should be nullable.

How to make the fields nullable:

- Select the desired **Field Name** from the list of fields. The field properties will be shown on the **Field Details** panel.
- Under **Field Options**, check the box for **Is Nullable**.
- Click **Apply** to save your changes.

All fields should be Nullable

After you have deployed the modified custom object, you should log out and log in to the Oracle Service Cloud application.

Step 9: Define where the activity history records will go.

If you defined a custom object for activity history, use the RightNow Workspace Designer to create a new tab for objects **Incident** and **Contact**, where the associated activity history records will appear.

Step 10: Turn on Single-Sign-On functionality.

Note that this step is only necessary if you are planning to implement Single Sign-On (i.e., simultaneous logging in of users into both Oracle Service Cloud and Bright Pattern Contact Center environments.)

Single Sign-On works in the following way: When a user logs into the integrated environment for the first time, the user will log into the RightNow application first and will then be presented with the Bright Pattern Contact Center Agent Desktop Login screen. Upon successful login, the user's Bright Pattern Contact Center username and password will be remembered in the Oracle Service Cloud application, so that the next time this user logs into Oracle Service Cloud, the user will be automatically logged into the Bright Pattern Contact Center Agent Desktop as well. Note that the user may have to re-supply login credentials from time to time in case the Bright Pattern password is set to expire according to the security practices of your contact center.

To support Single Sign-On, follow these steps:

- Navigate to *Configuration > Database > Custom Fields*.
- Select *Staff Account*.
- Create these custom fields:
 - **bpusername** field of the **Text Field** type.
 - **bppassword_hash** field of the **Text Area** type.

[RN-integration-guide-single-sign-on.png](#)



Step 11: Enable users to use the integrated Agent Desktop.

- Go to *Staff Management > Profiles*.
- Select the profile of the users who will be using the integrated desktop in your organization (e.g., agents).
- Open this profile and click the **Add-ins** tab.
- Select the **ServicePattern Add-in** checkbox. Save the configuration changes. This enables the integrated desktop for users with the selected profile. If necessary, repeat the procedure for other profiles. Log out of the RightNow application.

[Rightnow-integration-guide-image8.png](#)



Step 12: Log in with your Bright Pattern Contact Center credentials.

- Log into the Oracle Service Cloud application again. Make sure you log in with one of the profiles for which the integrated desktop was enabled during the previous step.
- Go to *File > Options > Tool Windows*.
- Select **ServicePattern Agent Control** and click **OK**.
- The Agent Desktop login window will open. Drag this window to the right part of your Oracle Service Cloud desktop--it will become a widget within the Oracle Service Cloud application.

This step has to be repeated on computers of all other Oracle Service Cloud users who need access to the integrated desktop.

Rightnow-integration-guide-image9.png

Rightnow-integration-guide-image10.png

[RN-integration-guide-login-floating.png](#)



[RN-integration-guide-login-nailed.png](#)



Step 13: Authenticate your newly integrated account.

- Enter your Bright Pattern credentials.

If you configured the **Domain** property in step 3, you will only have to enter your username and password on the login screen. Otherwise, you will also see and have to specify the **Domain** field for your initial login. Use the domain name assigned to your contact center at the service provider level.

By default, you log in with a [softphone](#). To choose another device, click the current *Phone device* setting and select the desired type of device from the menu that appears. For more information about the available device options, see section [Selecting a Phone Device](#) of the *Agent Guide*.

RN-integration-guide-login-phone-device.png

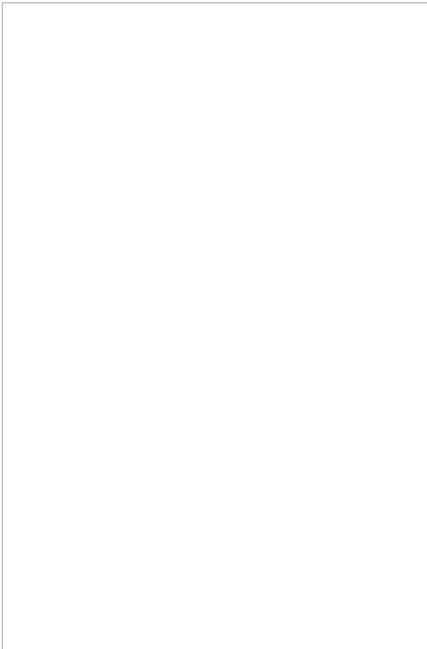


Step 14: Log in and complete Agent Desktop installation.

- Click the **Login** button.

Note that if this is your first login into the Bright Pattern Contact Center on the given computer, you will be prompted to [install the Agent Desktop Helper Application](#).

The Bright Pattern Contact Center Agent Desktop widget will now show a standard set of tabs and controls available to a contact center agent. For more information about the Agent Desktop tabs and controls see the [Agent Guide](#). Note that the appearance and location of these controls has been modified to match the overall look and feel of the RightNow application.

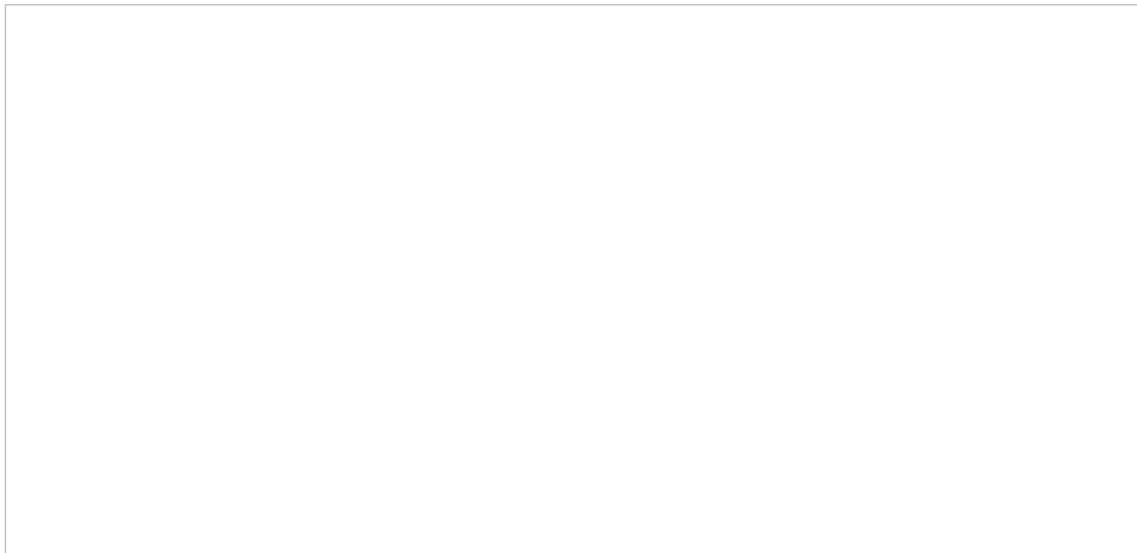


Accessing Oracle Service Cloud Data from Scenarios

If you do not wish to configure your Bright Pattern Contact Center for Single Sign-On with Oracle Service Cloud, you can access Oracle Service Cloud data directly from Bright Pattern scenarios instead.

For every customer interaction that enters your contact center, the Bright Pattern Contact Center has to process that specific interaction to determine what to do with it (e.g., what prompts or announcements to apply, what resources to queue for, what music to play, or when to over-flow to alternate resources). The logic of such automated interaction processing is defined in scenarios. Execution of a scenario with respect to a specific interaction is triggered by a particular event, such as the arrival of a call at a specific access number or initiation of a chat session from a specific web page.

Scenarios are designed and edited in the application called [Scenario Builder](#). This application is launched from the Contact Center Administrator application when you add a new scenario or select an existing one for editing. For more information, see section [Scenarios Overview](#) of the *Contact Center Administrator Guide*.



Scenario Builder

Configuration

The instructions that follow will walk you through the process of accessing Oracle Service Cloud (RightNow) data directly from Bright Pattern scenarios.

Step 1: Add RightNow as an integration account.

- Open the Bright Pattern Contact Center Administrator application.
- Go to *Call Center Configuration > Integration Accounts*.
- Click **Add account**.
- Select **RightNow**.
- Click **OK**.

Step 2: Establish credentials for your RightNow integration account.

- Create a **Name** for this integration account.
- Copy your RightNow domain URL, and paste it to the **URL** field.
- Provide a username and password for accessing RightNow data via this integration account.
- Click **Apply**.

[Rightnow-integration-guide-image17.PNG](#)



Step 3: Confirm that Oracle Service Cloud and BrightPattern are connected.

Click the **Test connection** button. You should receive confirmation that the connection between the Bright Pattern platform and Oracle Service Cloud data repository is valid.

Step 4: Enable data access from scenarios, and turn on screen-pop functionality.

You can make Oracle Service Cloud data accessible from scenarios, as well as enable screen-pop, when working in the Bright Pattern Contact Center [Scenario Builder](#) application.

Scenario Blocks

After you have set up your Oracle Service Cloud (RightNow) integration account, you are able to create and edit scenarios within the Scenario Builder application.

To access Oracle Service Cloud data from a scenario, drag the following scenario blocks onto your scenario.

[RightNow scenario blocks](#)



RightNow Search

The [RightNow Search](#) scenario block is used to obtain Oracle Service Cloud data.

Settings

RightNow Search settings are described as follows.

Title text

Title text is the name of the block instance.

ROQL Query

ROQL Query is the record selection statement in the RightNow Object Query Language. It may contain application variables specified as *\$(varname)*.

Recordset name

Recordset name is the name of the recordset that will be retrieved via this search operation.



RightNow Create Object

The [RightNow Create Object](#) scenario block is used to create new records in Oracle Service Cloud.

Settings

RightNow Create Object settings are described as follows.

Title text

Title text is the name of the block instance.

Object type

The *object type* is the type of the RightNow object to be created. You can either select one of the standard objects from the drop-down menu or enter the * name of the desired custom object type.

Variable name of object ID

This is the name of the variable that will be used as identifier for the RightNow object to be created. It will be set only if the block succeeds.

Set fields

This setting is reserved.

Raw JSON

Clicking *Raw JSON* enables object properties to be specified in JSON format.

[RightNow Create Object scenario block properties](#)



RightNow Update Object

The [RightNow Update Object](#) scenario block is used to update existing Oracle Service Cloud records.

Settings

RightNow Update Object settings are described as follows.

Title text

Title text is the name of the block instance.

Object Type

Object Type is the type of the RightNow object to be created. You can either select one of the standard objects from the drop-down menu or enter the name of the desired custom object type.

Object Identifier

This is the identifier of the object to be updated.

Set fields

This setting is reserved.

Raw JSON

Clicking *Raw JSON* enables object properties to be specified in JSON format.

RightNow Update Object scenario block settings

RightNow Screen Pop

The [RightNow Screen Pop](#) scenario block is used to synchronize the delivery of calls and related Oracle Service Cloud records to the agents; records can be retrieved using either object IDs or predefined Oracle Service Cloud reports with multiple selection criteria.

Settings

RightNow Screen Pop settings are described as follows.

Title text

Title text is the name of the block instance.

Pop screen upon answer

By default, the screen-pop occurs as soon as the interaction is delivered to the agent (i.e., during the alert phase); select this checkbox if you want the screen-pop to occur when the agent accepts the interaction for handling.

Object

Use this option when the scenario can precisely identify the object associated with the interaction using object ID. A Oracle Service Cloud page with the object properties will be displayed to the agent.

- **Object Identifier** – This is the identifier of the RightNow object to be displayed. Object Identifier must be specified if the **Object** option is selected. It may be specified as an application variable in form \$(varname).
- **Object type** – *Object type* is the type of the RightNow object to be displayed.

Search results

Use this option to run a predefined Oracle Service Cloud report for object selection. The results of the report will appear on the agent's screen.

- **Report ID** - *Report ID* is the identifier of the Oracle Service Cloud report to be run for object selection.
- **Filters** - Click **add** to define a filter for selecting records within this report. Multiple filters can be defined.
 - **Expression** - Expression is the table name and field name from the Oracle Service Cloud report definition that will be used as a selection criterion (e.g., *contacts.any_phone_raw*).
 - **Operator** - This is the operator used for selection.
 - **Value** - This can be a single value, a list of values, or a value range. Values can be defined as scenario variables (e.g., *\$(ANI)*).

Cancel screen pop

The available interaction data cannot be used to identify any relevant Oracle Service Cloud records. Use this option to cancel screen-pop of a specific Oracle Service Cloud page that may have been set by a previous use of this block in the same scenario.

[RightNow Screen Pop scenario block settings](#)

RightNow Select Account

You can create multiple RightNow integration accounts for access to different Oracle Service Cloud systems. If you have multiple integration accounts, use scenario block [RightNow Select Account](#) to specify the integration account that will be used by RightNow blocks in the given scenario. If this block is not used, all RightNow blocks in the given scenario will use access data from the integration account marked as **Default account**.

Settings for RightNow Select Account are described as follows:

- **Title text** – Title text is the name of the block instance.
- **Account** – Account is the name of the RightNow integration account that will be used for access to Oracle Service Cloud data by subsequent RightNow blocks in the given scenario.

[RightNow Select Account settings](#)

Refer to the [Scenario Builder Overview](#) for additional supporting documentation on scenarios and scenario blocks.

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Integrated Agent Desktop

The integrated Agent Desktop user interface is the same as the Bright Pattern Contact Center Agent Desktop application, but with the look and feel of the Oracle Service Cloud environment. Designed to increase agent productivity, the integrated Agent Desktop displays only the controls and information needed at each point of work.

Agents and supervisors can work more efficiently using the following features:

- **Built-in software telephone** for inbound/outbound calls, voicemail, and so forth
- **Click-to-Call** functionality for dialing customers' phones with a single click
- **Oracle Service Cloud data** records for setting up campaigns, caller lists, screen-pop, and more

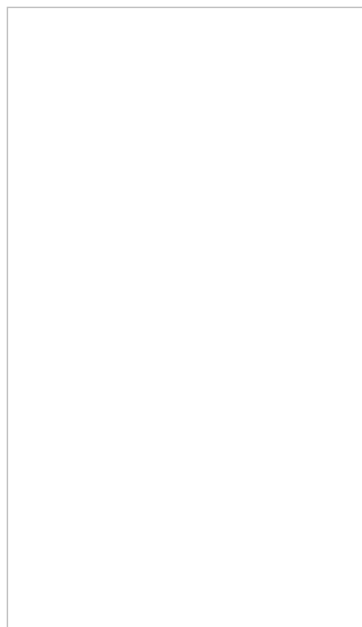
- **Screen-Pop** functionality for viewing relevant Oracle Service Cloud data during an interaction
- **Activity History** for real-time operations displays, information about conversations, saved ticket logs, call recordings, and voicemails

Refer to the Bright Pattern Contact Center [Agent Guide](#) to learn more about the Agent Desktop user interface and its applications.

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Softphone and Click-to-Call

Oracle Service Cloud integration puts a software telephone (softphone) right where you need it--on the integrated Agent Desktop. From the *Dial* tab of the Active Communications List, agents and supervisors can dial internal and external phone numbers by clicking the dialpad numbers or by typing them in to the text entry field.



Click-to-Call

Click-to-Call is an important function that allows you to initiate calls to people who originated or handled a Oracle Service Cloud ticket, with a single click. Contacts from previous interactions are saved in the system, so that agents and supervisors can call such contacts using the Click-to-Call function.

How to Use the Click-to-Call function

- Select a Oracle Service Cloud ticket assigned to someone who has a phone number configured in the system. The name of this person will appear in the *Dial* tab of the Agent Desktop with a Click-to-Call icon next to it.
- Click the Click-to-Call icon to make a call.

(If you click the phone instead, the number will appear in the number input field above. You can dial this number by clicking the **Initiate call** button next to this field.)

When the call is answered, you should have all of the call control functions (e.g., mute, hold, transfer, release) available to you via the integrated Bright Pattern Contact Center Agent Desktop window. Note that when you transfer an interaction to another integrated desktop user, the Oracle Service Cloud item that was open on your desktop at the time of transfer will be displayed for that user. For more information, see the [Agent Guide](#).

In the image shown, the integrated desktop displays an Oracle Service Cloud contact and a connected call in the Agent Desktop widget.

[RN-integration-guide-dialing-contact.png](#)



Note the following:

- If you make a call to another integrated desktop user, clicking the **Send screen** button will display your currently open Oracle Service Cloud record to that user.
- If you [transfer the call](#) to another integrated desktop user, the Oracle Service Cloud record that was open on your desktop at that time will be displayed to that user.
- If you [make a conference](#) with another integrated desktop user, the Oracle Service Cloud record that was open on your desktop at that time will be displayed for that user.

Next Steps

Performing the next couple steps will help you create relevant data associated with a customer interaction, which you can use to test activity history functionality.

- While still on the test call, select an incident associated with the Oracle Service Cloud contact.
- While you are on the call, note the basic interaction facts, including approximate start time, duration (talk + hold time), the number called, and disposition if any. These data elements will be used to test the activity history function.
- [Release the call](#).
- Click **Complete** to [finish the after-call work](#).
- Close the incident.

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Activity History

In the integrated Oracle Service Cloud environment, information about each interaction is saved, updated in real time, and shown as a running list of notes in the center of the desktop interface. The information contained in these notes is called *activity history*. Notes with basic data are added automatically to the activity history upon completion of any interaction activity (i.e., hanging up a call, ending a chat, setting dispositions, finishing after-call work (ACW), and so forth).

Interaction activity history is associated with the *Incident* or *Contact* that was present on the desktop at the end of the interaction processing. If no such object was present, activity history will be recorded without any associations.

Oracle Service Cloud ticket activity history includes interaction-processing details such as the following:

- Start time
- Contact number
- Duration (talk + hold)
- Interaction direction (outbound/inbound)
- Disposition
- Access to call recording

Becoming Familiar with Activity History

To test the activity history function, you simply release (i.e., complete or end) the previously established call. Upon completion of the after-call work (ACW), you should be able to see a new internal note added to the ticket with basic data about the call you just finished. This data includes start time, call type, phone number, duration (talk+hold time), disposition, service, and [global interaction identifier](#). The global interaction identifier is provided as a link. Clicking this link opens the [Interaction Records Search](#) page of the Contact Center Administrator application with the global interaction identifier preset as a search condition.

Step 1: Open the incident (i.e., the interaction) that you just completed.

- If you configured a custom object for activity history, click the tab corresponding to that object. The data should appear as the most recent record, in the fields that you defined.

Rightnow-integration-guide-image15.PNG



- If you did not configure a custom object, click the **Tasks** tab, and open the most recent task from the list. Most of the activity history data should appear in the **Notes** field.

Rightnow-integration-guide-image16.PNG



Step 2: Review and edit data.

- Review the activity history data and make sure it corresponds to the properties of the interaction that you completed.
- Note that activity history can be edited manually by the users who have corresponding permissions.

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