

5.8 Salesforce.com Integration Guide

Bright Pattern Documentation

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Purpose

The Bright Pattern Contact Center *Salesforce.com Integration Guide* provides detailed instructions for setting up your Bright Pattern Contact Center solution to function in an integrated manner with your Salesforce applications.

Integration embeds the Agent Desktop communications widget into your Salesforce applications and provides single sign-on functionality, Salesforce data-driven interaction routing, screen pop, activity history, and click-to-call functions.

Note that throughout this guide, configuration instructions and tutorials are given for Salesforce Classic, Lightning, and Service Cloud views, where applicable.

Audience

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

Integration Scope

Salesforce integration provides the following functions for your contact center:

Embedded Agent Desktop

The Bright Pattern Contact Center Agent Desktop is embedded into your Salesforce environment, providing users with real-time phone and chat capabilities without ever leaving Salesforce. For the full-screen view of Agent Desktop, logged-in agents have the option to pop out Agent Desktop into a separate browser tab.

Single Sign-On

Single Sign-on (SSO) provides simultaneous user logins to Salesforce and Bright Pattern Contact Center applications.

Salesforce Data Access

Integration provides access to your Salesforce objects via Bright Pattern scenario blocks, with the capability to create, search for (i.e., retrieve), update, and delete Salesforce objects. You can use Salesforce data to identify an agent best qualified to handle an incoming interaction using the information provided by the caller, update Salesforce data via self-service IVR applications, log your interactions, and much more.

Screen Pop

Screen pop is the display of relevant Salesforce objects (e.g., cases, contact records, etc.) on the agent's screen when an interaction is delivered to the agent.

Synchronization

Emails from the Agent Desktop application can be [synchronized](#) with SFDC for routing and reporting. Emails from Agent Desktop link to SFDC Person Accounts, Contacts, and Accounts.

List Import/Export

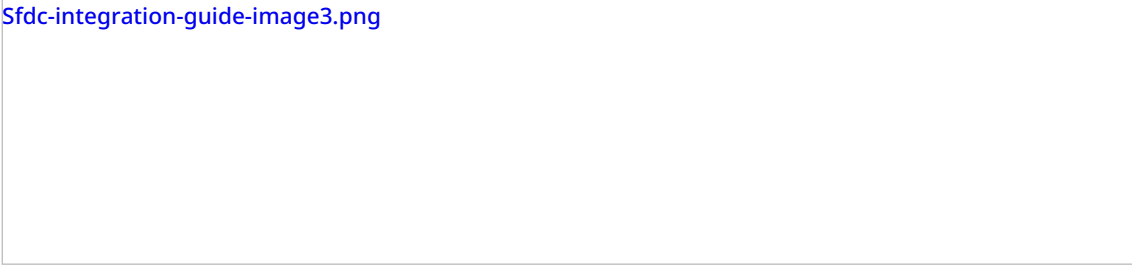
This feature allows you to import calling lists from Salesforce to Bright Pattern Contact Center, and export campaign results to Salesforce.

Activity History

Activity History helps agents to handle interactions in context. Activity History includes the following kinds of interaction-processing details:

- Activity date
- Call object
- Call type
- Call disposition
- Call duration
- Description
- Subject
- Status
- URL of recording or transcript

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Email and Case Routing

[Email routing](#) capabilities via the unified Agent Desktop distribute email messages to the agents who are most skilled to handle them. Post-interaction workflows can be set up to route cases to agents in the same manner.

Reports

Salesforce reports provide a comprehensive view of interaction-processing details (refer to the example shown).

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Click-to-Call

Click-to-call is the capability to dial contact numbers directly from Salesforce application webpages by simply clicking a phone icon or contact phone number.

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Automatically Mute Recordings

This integration includes a *muteRecordingUrls* feature that automatically mutes call recordings and pauses agents' screen recordings when specific pages are visited. This feature helps your contact center to be compliant when agents are receiving sensitive data (e.g., credit card numbers).

muteRecordingUrls is enabled in your [call center definition file](#) and allows both absolute and relative URLs when defined. For example, if your SFDC URL is <https://example.my.salesforce.com>, then the *muteRecordingsURLs* could be either:

```
<item sortOrder="7" name="muteRecordingUrls" label="Mute Recording Urls"> https://example.my.salesforce.com/mute\_this\_page </item>
```

or:

```
<item sortOrder="7" name="muteRecordingUrls" label="Mute Recording Urls"> /mute_this_page </item>
```

Note that the pages to be muted may be defined when uploading the call center definition file or from the [specific call center page](#).

Prerequisites

To configure Salesforce integration, you must have the following:

1. **"Production" level login credentials in Salesforce.** This is required for deploying the Bright Pattern managed app in a Salesforce environment. To verify the "Production" level credentials for proper permissions, login with your existing

credentials to the [Salesforce login](#).

2. **"System Administrator" role.** In your Salesforce environment, your user account should have the *System Administrator* role. If you are the creator of the developer account, then you are the system administrator by default; however, if this is not the case, verify you have the admin role, in case multiple users are logging in.
3. **Bright Pattern Contact Center version 3.6 or later.** For most types of integration described in this guide, Bright Pattern Contact Center version 3.6 or later is required. For import of calling lists and export of campaign results, Bright Pattern Contact Center version 3.10 or later is required.

Note: If you are unable to log into Salesforce.com directly, please contact your SFDC system administrator to review permission and access level settings.

Sales Cloud Classic Overview

This section of the *Salesforce Integration Guide* explains how to integrate your Bright Pattern Contact Center with Salesforce in the Salesforce Classic view.

Integration Configuration Steps

1. [Install Managed Package](#)
2. [Set up Call Center](#)
3. [Add Connected App to Enable Scenarios to Access Salesforce Data](#)
4. [Enable Single Sign-On in Salesforce](#)
5. [Add Salesforce Integration Account in Bright Pattern](#)
6. [Enable Screen Pop for Multiple-Matching Records](#)

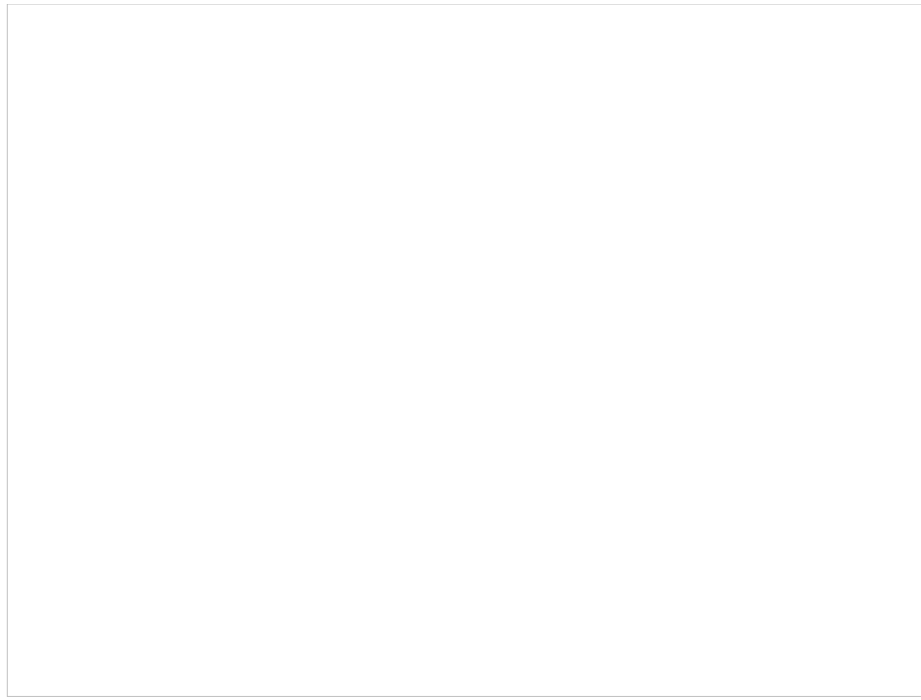
Lightning Overview

This section of the *Salesforce Integration Guide* explains how to integrate your Bright Pattern Contact Center with Salesforce in Lightning view.

For additional configuration options, see [Tutorials](#).

Integration Steps

1. [Install Managed Package](#)
2. [Set up Call Center](#)
3. [Create a Lightning App](#)
4. [Add Connected App to Enable Scenarios to Access Salesforce Data](#)
5. [Enable Single Sign-On](#)
6. [Add Salesforce Integration Account in Bright Pattern](#)
7. [Enable Screen Pop for Multiple-Matching Records](#)



Salesforce Lightning

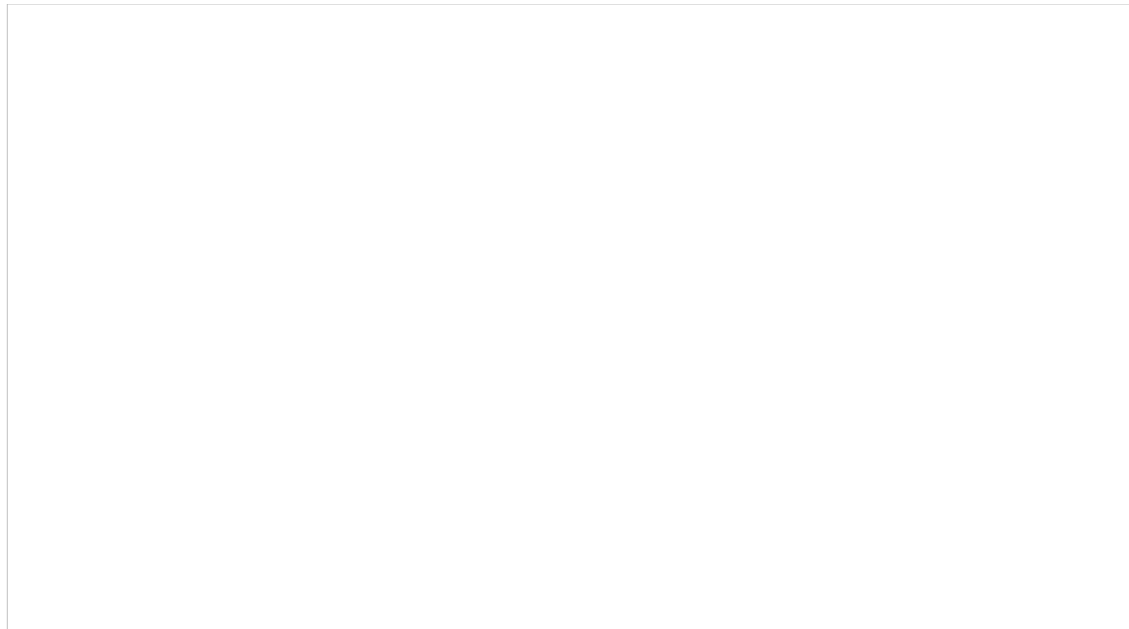
Service Cloud Overview

This section of the *Salesforce Integration Guide* explains how to integrate Bright Pattern Contact Center with Salesforce in Service Cloud view, placing the embedded Agent Desktop in your Service apps.

Service integration configuration is almost identical to Lightning integration configuration, with one exception when [creating a new Lightning app](#) to make the embedded Agent Desktop widget appear in your Service app. We recommend following Lightning integration configuration steps (see the following list), being sure to read the instructions carefully in section [Add Connected App to Enable Scenarios to Access Salesforce Data](#).

Integration Steps

1. [Install Managed Package](#)
2. [Set up Call Center](#)
3. [Create a Lightning App](#)
4. [Add Connected App to Enable Scenarios to Access Salesforce Data](#)
5. [Enable Single Sign-On](#)
6. [Add Salesforce Integration Account in Bright Pattern](#)
7. [Enable Screen Pop for Multiple-Matching Records](#)



Salesforce Service

All Salesforce Tutorials

After integrating your [Salesforce Classic](#) or [Salesforce Lightning](#) environment with your Bright Pattern contact center, you will want to configure the specific actions and situations you want to happen in Salesforce, such as importing calling lists, exporting campaign results, and so forth. In order to complete such actions, we present the following tutorials.

Articles

- [Configure Click-to-Preview](#)
- [Configure Manually Rescheduled Preview Campaign Calls in Salesforce Lightning](#)
- [Configure Salesforce Data Screen Pop for Outbound Preview Campaigns](#)
- [Customize Salesforce Activity Objects](#)
- [Enable Service Console or Service Cloud](#)
- [Import Calling Lists and Export Campaign Results](#)
- [Locate or Create Screen Pop URLs for a Salesforce Object](#)
- [Pause and Resume Recordings](#)
- [Remove Salesforce Integration](#)
- [Reschedule Campaign Calls Manually from the Integrated Agent Desktop Widget](#)
- [Salesforce Lightning Scenario and Workflow Variables](#)
- [Search for a Contact](#)