

Puzzel-Salesforce Omni-Channel integration

Puzzel-Salesforce integration is further strengthened by directing the Salesforce chat sessions through Puzzel expert routing mechanism which can dramatically lessen resolution times and increase customer satisfaction.

Note

To be able to utilise this facility, you need to have the Puzzel- Salesforce integration set up in your environment and Salesforce chat solution configured on a Site. For more details on integration Puzzel Contact Centre solution with Salesforce, please visit the [Puzzel-Salesforce integration](#) section.

How does it work?

When a chat session is initiated by the customer on a Site with Salesforce chat, the request is sent to Puzzel's skilled based routing engine.

Chat

* First Name

Andy

* Last Name

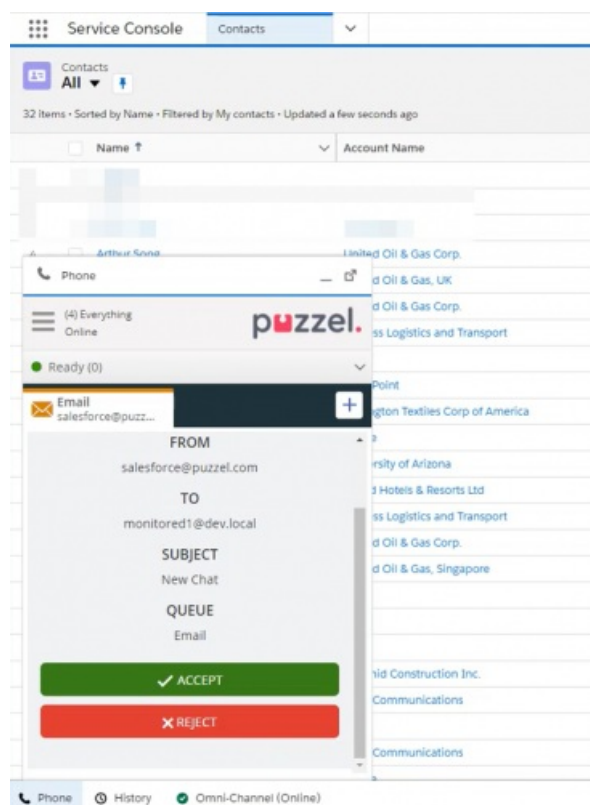
Young

Email

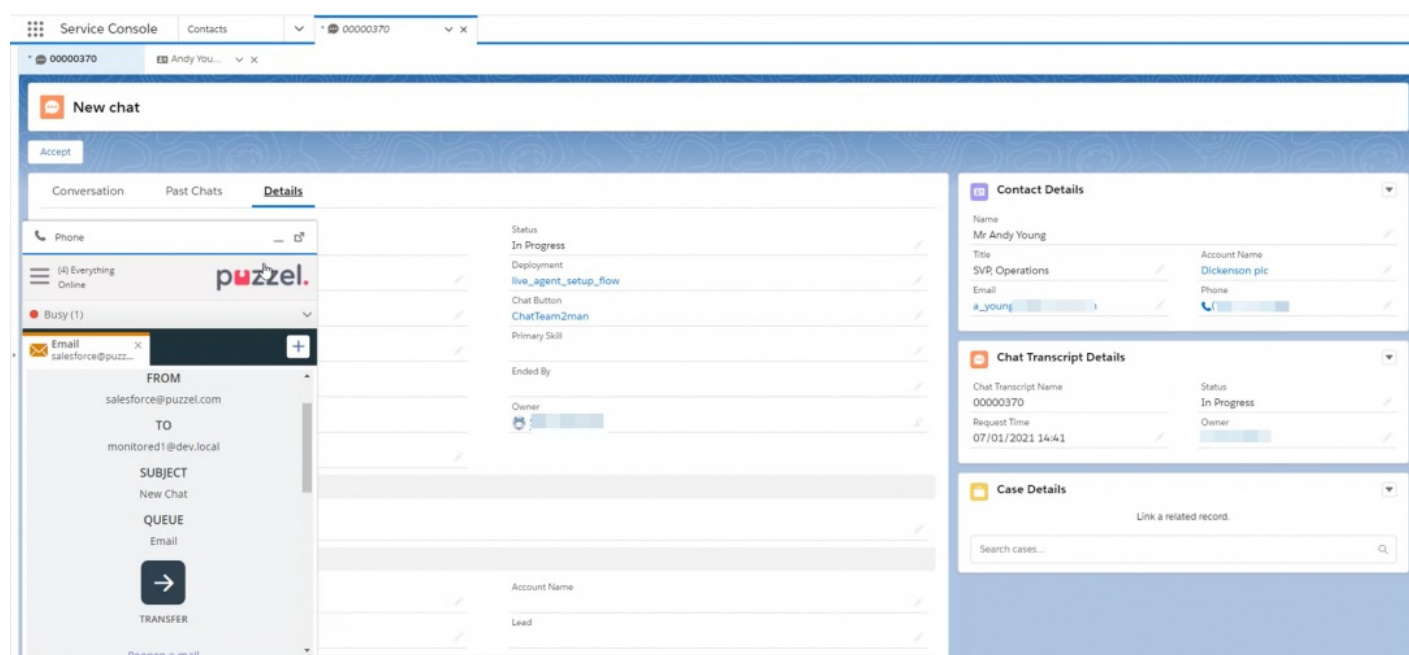
a_yo@

Start Chatting

The engine then determines the assignment of requests based on several pre-defined attributes and allocates it to the best qualified available agent as an email request.



Once the agent accepts the request, the customer record is automatically pulled up and the agent can begin the conversation.



Upon ending the chat session [either by customer or by agent] the request is also wrapped up within Puzzel.

Setting up the Salesforce Omni Channel integration to work with Puzzel

To be able to utilise Puzzel routing mechanism to assign Salesforce chat session to agents, you will have to make the following configurations in your Salesforce environment and provide Puzzel with the details mentioned in the last section of this article. Puzzel will then be able to set up the functionality to be working in your environment.

Note

This functionality is not offered as a out of box feature. You will need to do the configurations detailed in the next sections and provide Puzzel with the requested information in the last section. Puzzel will then be able to configure the Omni channel support in your environment.

Salesforce configurations

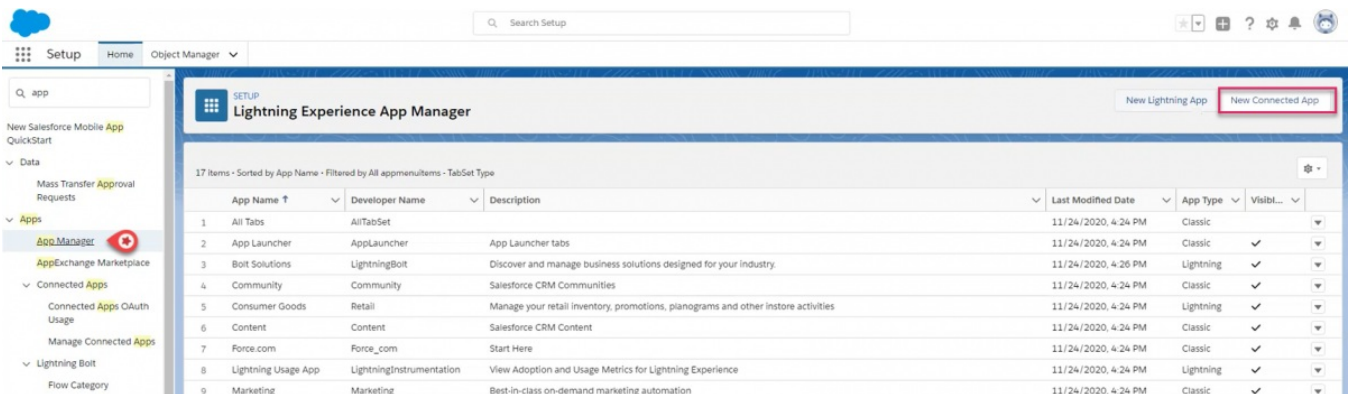
To be able to do the following configurations, you will need to have Administrator privileges on Salesforce.

Enable Authentication into Salesforce

You will be required to create a connected app for Puzzel, to request access to the Salesforce data. For any connected app to request data, it is essential that the application is already integrated into Salesforce environment. For more details on integrating PCC into Salesforce please read [Puzzel-Salesforce integration](#) section on help.puzzel.com This will allow Puzzel to access the current users that are logged in into Salesforce and assign the chat session using the skill-based routing mechanism.

To create a connected app and specify the scope of authorization in Salesforce, you need to:

1. Go to quick finder and type App Manager. Select App Manager from the results displayed as shown in the figure below. Click on New Connected App option found on the top right corner.



2. Enter the following details in the Basic Information section
 - a. Specify a name to the Connected Application
 - b. Enter the API name [API name is the name used when referring to your app from a program. By default, it takes the connected app name]
 - c. Enter the email address and contact telephone number

New Connected App

Save Cancel

Basic Information

Connected App Name

API Name

Contact Email

Contact Phone

Logo Image URL
[Upload logo image](#) or [Choose one of our sample logos](#)

Icon URL
[Choose one of our sample logos](#)

Info URL

Description

3. Select Enable OAuth Settings under API(Enable OAuth Settings) section. This will now display the options under it

API (Enable OAuth Settings)

Enable OAuth Settings ☒

Enable for Device Flow ☐

Callback URL

Use digital signatures ☐

Selected OAuth Scopes

Available OAuth Scopes

- Access Pardot services (pardot_api)
- Access and manage your Chatter data (chatter_api)
- Access and manage your Eclair data (eclair_api)
- Access and manage your Wave data (wave_api)
- Access and manage your data (api)**
- Access custom permissions (custom_permissions)
- Access your basic information (id, profile, email, address, phone)
- Allow access to your unique identifier (openid)
- Full access (full)
- Perform requests on your behalf at any time (refresh_token, offline_access)

Add Remove

Selected OAuth Scopes

Require Secret for Web Server Flow ☒

4. Enter https:// for callback URL
5. Select and move Access and manage your data(api) option to selected OAuth scopes

API (Enable OAuth Settings)

Enable OAuth Settings ☒

Enable for Device Flow ☐

Callback URL

Use digital signatures ☐

Selected OAuth Scopes

Available OAuth Scopes

- Access Pardot services (pardot_api)
- Access and manage your Chatter data (chatter_api)
- Access and manage your Eclair data (eclair_api)
- Access and manage your Wave data (wave_api)
- Access custom permissions (custom_permissions)
- Access your basic information (id, profile, email, address, phone)
- Allow access to your unique identifier (openid)
- Full access (full)
- Perform requests on your behalf at any time (refresh_token, offline_access)
- Provide access to custom applications (visualforce)

Add Remove

Selected OAuth Scopes

Access and manage your data (api)

6. Click save to see the new Connected App
7. Note down the Customer Key and the Secret. You will need to provide this to Puzzel. [See the last section of this article]

SETUP
Manage Connected Apps

Connected App Name
skudev2PuzzelConnect

Back to List: Custom Apps

Allow from 2-10 minutes for your changes to take effect on the server before using the connected app

Version: 1.0
API Name: skudev2PuzzelConnect
Created Date: 11/25/2020, 10:55 AM
By: [Stefan Uzunov](#)
Contact Email: uzunov.stefan@gmail.com
Contact Phone: +359876233288
Last Modified Date: 11/25/2020, 10:55 AM
By: [Stefan Uzunov](#)
Description: Info URL

API (Enable OAuth Settings)

Consumer Key: 3MvG9k8t168mda_8EypH9Q5_4f9vBd5g5Fvpt_cdzk3K2TqUg0EHXAuTgDPfCILNUqts5bIR44 HNNEmKk
Consumer Secret: 3ABF37D581516165687D8F87A64575F6F4795544CDBCC5685C3958C613C6C8F8

Selected OAuth Scopes: Access and manage your data (api)
Enable for Device Flow: ☐
Introspect All Tokens: ☐
Include Custom Attributes: ☐
Enable Single Logout: Single Logout disabled
Require Secret for Web Server Flow: ☐
Token Valid for: 0 Hour(s)
Include Custom Permissions: ☐

Initial Access Token for Dynamic Client Registration
Initial Access Token: Generate

Custom Connected App Handler
Apex Plugin Class:
Run As:

Trusted IP Range for OAuth Web Server Flow
No records to display

Create a Salesforce User

You will need to create a Salesforce user with the following **Object Settings** permissions:

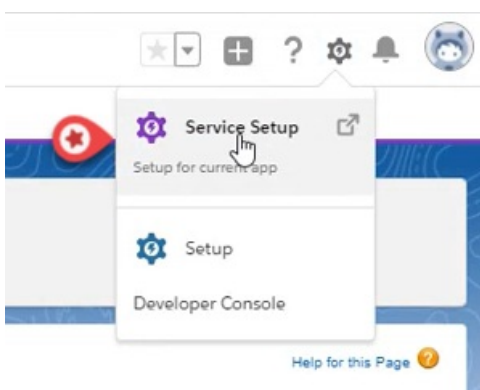
- Chat Transcripts – View All (Read permissions only on 'Status' field)
- Push Topics – Read

Provide Puzzel with the Username, password, and security token for this user. Please see the last section of this article.


Enable Omni-channel functionality

To activate Omni channel functionality, you need to:

1. Click on the Settings icon on the top right corner of the screen
2. Select Service Setup



3. Select Omni-Channel Settings under Omni-Channel in the quick finder
4. Select Enable Omni-Channel
5. Click Save.




SETUP

Omni-Channel Settings

Omni-Channel Settings

Omni-Channel routes work items to your support agents. It sets agent capacity for accepting work and agent availability.

Enable Omni-Channel	<input checked="" type="checkbox"/>	
Enable Skills-Based Routing	<input type="checkbox"/>	
Enable Secondary Routing Priority	<input type="checkbox"/>	
Enable Status-Based Capacity Model	<input type="checkbox"/>	
Display a login confirmation upon loading a console with Omni-Channel	<input type="checkbox"/>	

Save

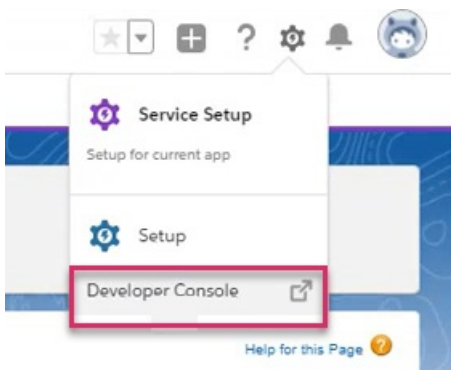
Cancel

Create PushTopic record

You need to create a PushTopic record specifying the events for which you wish to receive notifications for any changes to the Salesforce data. In this scenario, we would like to be notified when a new chat session has been initiated so that it can be processed via Puzzel routing engine.

To create a PushTopic record:

1. Go to Developer Console from the menu option on the top right corner of your screen



2. Go to Debug -> Open Execute Anonymous Window
3. Paste the following code in the Enter Apex Code window and click on Execute

```
PushTopic pushTopic = new PushTopic();
pushTopic.Name = 'PSRPushTopic';
pushTopic.Query = 'Select Id,CreateDate,WorkItemId,ServiceChannelId,groupid from PendingServiceRouting where RoutingModel =\'ExternalRouting\'';
pushTopic.ApiVersion = 50.0;
pushTopic.NotifyForOperationCreate = true;
pushTopic.NotifyForOperationUpdate = true;
pushTopic.NotifyForOperationDelete = true;
insert pushTopic;
```


4. Verify that the code has been successfully executed in the logs below

User	Application	Operation	Time	Status	Read	Size
integrationUser	Unknown	/services/data/v50.0/to...	11/25/2020, 11:04:35 ...	Success	Unread	3.62 KB
integrationUser	Browser	/omnichannel/settings.a...	11/25/2020, 11:03:57 ...	Success	Unread	511 bytes

Configuring Omni-Channel in Salesforce

To configure Omni-Channel, perform the following steps:

1. Search for Routing Configurations in the quick finder and click on Edit.
2. Set Routing mode to External and save the settings

The screenshot shows the 'Routing Configurations' setup page in Salesforce. The 'Basic Information' section includes fields for 'Routing Configuration Name' (q1), 'Developer Name' (q1), and 'Overflow Assignee' (User). The 'Routing Settings' section includes 'Routing Priority' (1), 'Routing Model' (Most Available), and 'Push Time-Out (seconds)' (10). The 'Work Item Size' section includes 'Units of Capacity' (5.00) and 'Percentage of Capacity' (100%). The 'Routing Mode' dropdown is set to 'External Routing'.

3. Search for Presence Configurations in the quick finder and click on Edit.
4. Select Automatically Accept Requests and save the changes.

The screenshot shows the 'Presence Configurations' setup page in Salesforce. The 'Basic Information' section includes fields for 'Presence Configuration Name' (ChatTeam), 'Developer Name' (ChatTeam), and 'Capacity' (20). The 'Automatically Accept Requests' checkbox is checked. The 'Allow Agents to Decline Requests' checkbox is unchecked. The 'Update Status on Decline' field is empty. The 'Allow Agents to Choose a Decline Reason' checkbox is unchecked. The 'Update Status on Push Time-Out' field is empty. The 'Request Sound Enabled' checkbox is unchecked. The 'Disconnect Sound Enabled' checkbox is unchecked.

Credentials to be sent to Puzzel

Please call Puzzel with the following credentials to help direct chat sessions through Puzzel.

- Connected App Customer key
- Connected App Customer Secret
- Salesforce Username
- Password to the above user
- Security Token for the user
- List of Group id and names for all queues in Salesforce. To get this list, run the follow SQL query

Select Id, name from Group where type = 'Queue'