

Salesforce Integration



Administration manual for system providers

6/3/2022

Product line Neo, version 7.x

The described functions can be used with the following ASC products:

EVOIP^{neo}

EVOLUTION^{neo} / XXL / eco

Please note that you can always find the most up-to-date technical documentation and product updates in the partner area on our website at <https://www.asctechnologies.com>.

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1 General information

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2 Introduction

Salesforce is an international provider of cloud computing solutions for companies. Salesforce offers *Software and Platform as a Service*. Salesforce products and services support multiple tenants and are designed to help companies interconnect their employees, customers, and products.

The Salesforce integration enables you to control the recording. You can link the conversations to the contacts and use them for customer care purposes. In addition, it is possible to use the recordings for analysis by means of transcription and keyword spotting. Within the Salesforce application, you can search for recordings and replay them.

For information about the configuration of the integration refer to the respective administration manual.

For its usage with Salesforce, the following configurations in the application System Configuration are required:

- Configure server, for information about the configuration refer to the respective administration manual of the integration.
- PBX module activate PHONEapp, for further information about the PBX configuration refer to the respective administration manual of the integration
- Configure PHONEapp, see [chapter "Configure PHONEapp", p. 47](#)
- Configure phones, see [chapter "Configure phones", p. 51](#)
- Configure additional data, see [chapter "Configure additional data", p. 53](#)
- Configure and activate integration, for more information refer to the respective administration manual of the integration.
- Create recording profile in the Recording Planner, see [Configure Recording Planner](#)

3 Preconditions

The following conditions must be met to be able to configure and use the Salesforce application:

- The operating system must have been installed according to our specifications, refer to the installation manual *Configuration Windows Server 2016*, *Configuration Windows Server 2019* or *Configuration Windows Server 2022*.
- The Neo recording software must have been installed according to our specifications, refer to the installation manual for system providers Installation recording software of ASC.
- The integration must have been configured according to our specifications; refer to the administration manual of the respective integration solution.

The Neo system must be connected to the Internet and port 443 must have been opened for bidirectional communication to enable Salesforce to communicate with the Neo system.

To use the Salesforce application, you have to additionally carry out the following configurations in the application System Configuration:

- Configure PHONEapp, see [chapter "Configure PHONEapp", p. 47](#)
- Configure phones, see [chapter "Configure phones", p. 51](#)
- Configure additional data, see [chapter "Configure additional data", p. 53](#)
- Create recording profile in the Recording Planner, see [Configure Recording Planner](#)

3.1 Licenses

License name	Number
ASC Connect for Salesforce	1 license per user

Tab. 1: ASC licenses

3.2 Supported integrations

The add-on with the Salesforce application can be used with all integrations supporting the function *Record on demand*.

4 Installation

4.1 Install Salesforce application

You can download the application from *Salesforce appexchange*.

1. Open the following URL in a browser:
<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000EcrSGUAZ>
2. Click on the button *Get It Now*.



Fig. 1: Download application from appexchange

Follow the on-screen instructions to download and install the package.

3. Install and update the application as *Admin only*.



Install the application as administrator to avoid access issues.

4.2 Install SSL certificate



The Neo system requires a signed [SSL](#) certificate from a root certifying authority; otherwise it will not be possible to establish a connection between Salesforce and the recording server. The operator of the Neo system must have the certificate issued for the respective DNS name and install it on the recording server with the Certificate Import Tool. The DNS name for the Neo system for which the certificate has been issued must be used as end device in the Salesforce configuration.



A Wildcard certificate cannot be used for multi-level domains because only the 1st level *.google.com is validated. For a subdomain such as *.subdomain.google.com, you must issue a new Wildcard certificate.

As an alternative to using several Wildcard certificates, you can opt for a multi-domain Wildcard certificate, too.

4.2.1 Import customer-specific HTTPS certificate

If you would like to use a customer-specific certificate, you can import it with the program *certimporter.exe*.

1. Change to the folder *C:\Program Files (x86)\ASC\ASC Product Suite\scripts*.
2. Open the file *certimporter.exe*.
⇒ The window Certificate Import Tool appears.

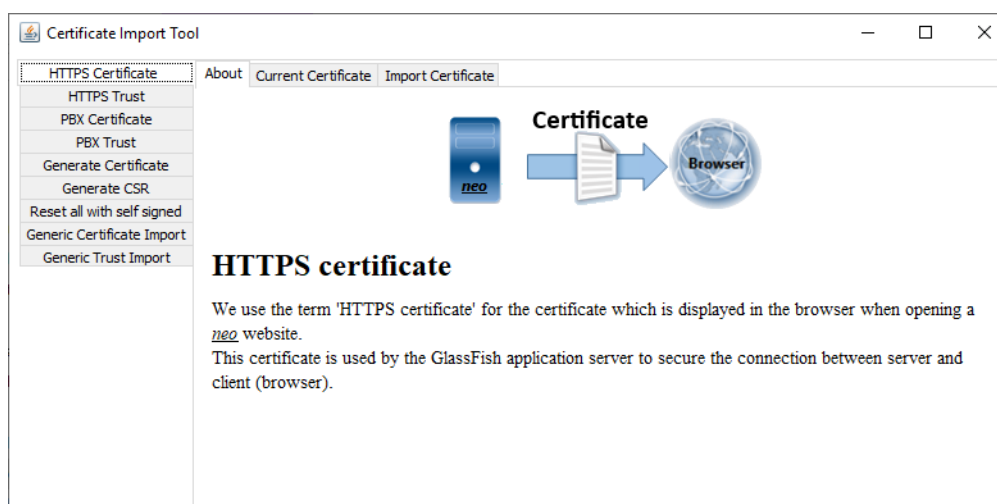


Fig. 2: Certificate Import Tool

The following formats are supported:

- PKCS12
- X.509/Private key

4.2.1.1 Import X.509/Private key

1. Select the menu item *HTTPS Certificate* in the navigation bar.
2. Click on the tab *Import Certificate*.
3. If your certificate is a X.509/Private, select the option *Certificate X.509 (RSA Private key)*.
4. Click on the button next to the field *Certificate X.509* to select your certificate.

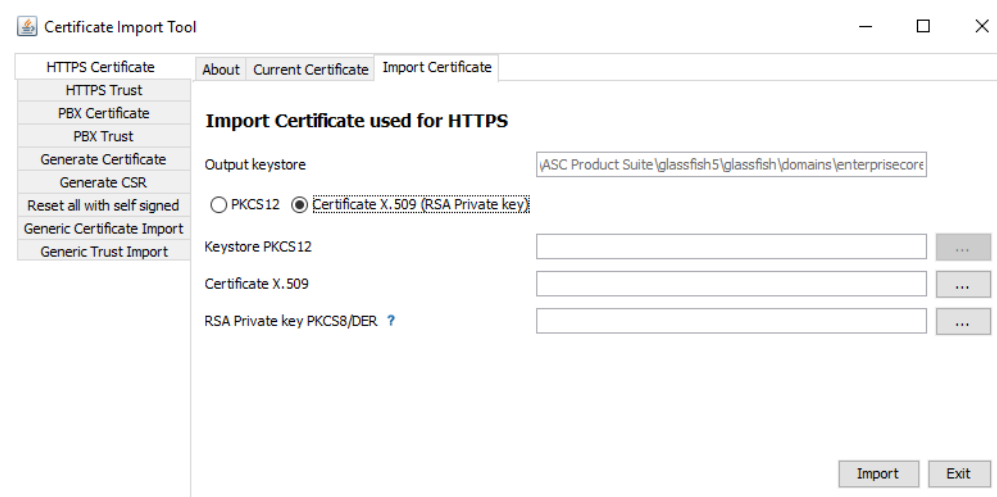


Fig. 3: Import X.509

5. Click on the button *Import*.
⇒ The window to enter the password for the private key appears.

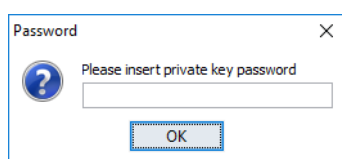


Fig. 4: Enter password for the private key

6. Enter the password for your private key.
If you do not use a password, leave this field empty.

7. Click on the button *OK* to confirm the password.
⇒ A message will inform you about the successful import.

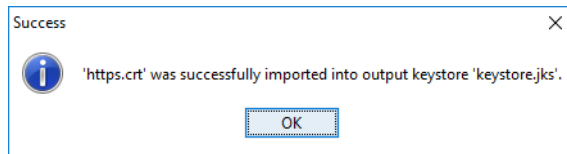


Fig. 5: Message - Successful import

8. Click on the button *OK* to confirm the success message.
9. Click on the button *Exit* to exit the program.
10. Restart the Glassfish server so that the certificate will be applied.
11. In the tab *Current Certificate*, you can check the currently valid certificate.

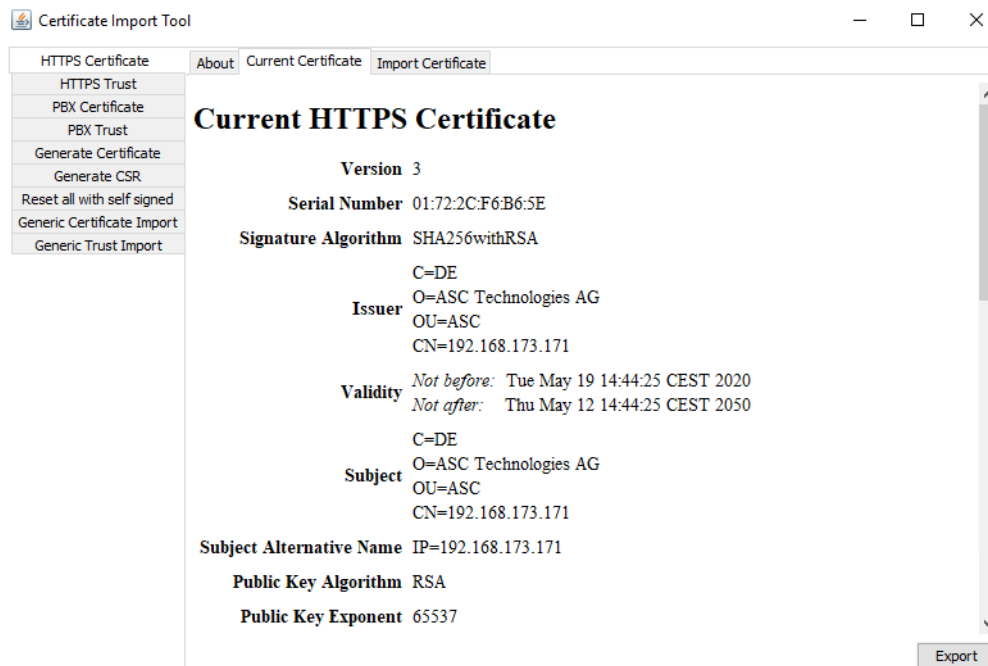


Fig. 6: Check currently valid HTTPS certificate

4.2.1.2 Import PKCS12

1. Select the menu item *HTTPS Certificate* in the navigation bar.
2. Click on the tab *Import Certificate*.
3. If your certificate is a PKCS12 Keystore, select the option *PKCS12*.
4. Click on the button next to the field *Keystore PKCS12* to select your PKCS12 Keystore.

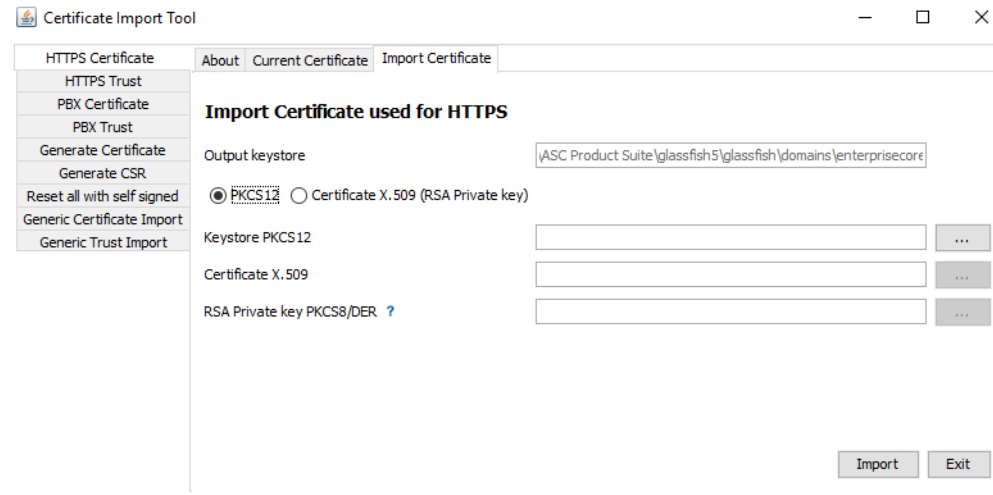


Fig. 7: Import PKCS12 Keystore

5. Click on the button *Import*.

⇒ The window to enter the alias for the PKCS12 Keystore appears.

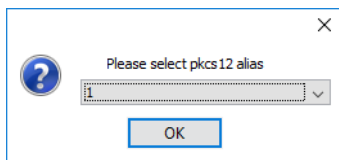


Fig. 8: Confirm alias

6. Click on the button *OK* to confirm the alias.

⇒ The window to enter the password appears.

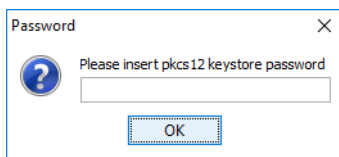


Fig. 9: Enter password for PKCS12 Keystore

7. Enter the password for your PKCS12 Keystore.
If you do not use a password, leave this field empty.
8. Click on the button *OK* to confirm the password.
9. Click on the button *Exit* to exit the program.
10. Restart the Glassfish server so that the certificate will be applied.
11. In the tab *Current Certificate*, you can view the currently valid certificate.

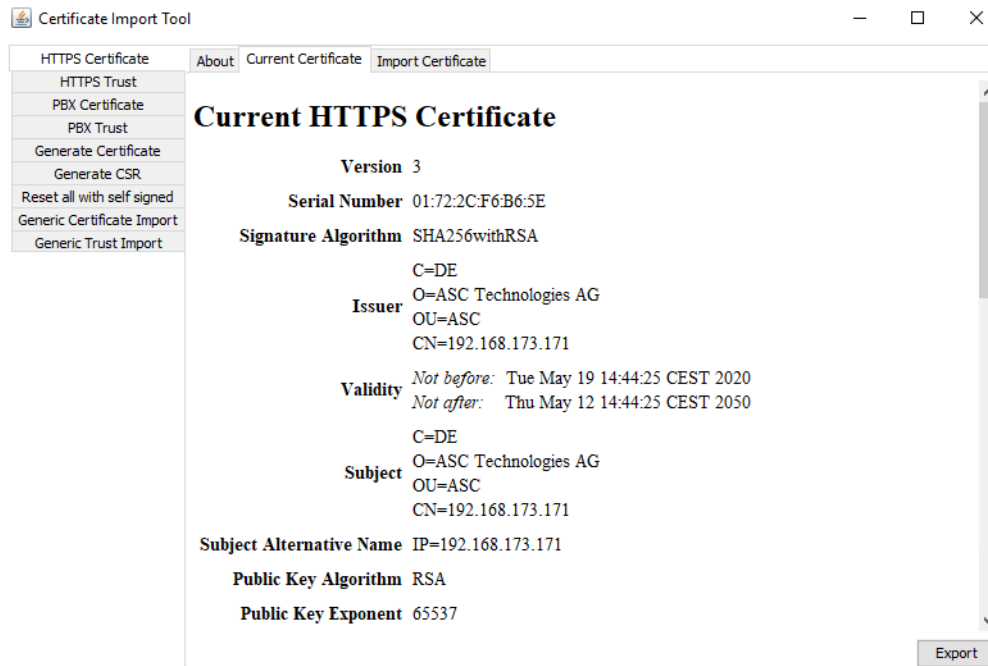


Fig. 10: Check currently valid HTTPS certificate

5 Configuration

5.1 Configure Salesforce application

To be able to use the application, proceed as follows:

- *Confirm my domain*
 - *Automatically create application*
 - *Set up the new connected application*
 - *Create CSP trusted site*
 - *Configure remote site settings*
 - *Manage licenses for installed packages*
 - *Configure remote site settings*
 - *Assign permission sets*
 - *Assign page layout*
 - *Configure tagging permissions*
 - *Configure customCP fields*
1. Log in to the Salesforce web interface in the browser as the administrator of the tenant of ASC.
 2. Within the icon *Settings* in the top right corner, select the menu item *Setup*.

5.1.1 Confirm my domain

The domain created for Salesforce must always be confirmed as *My Domain*.

1. In the navigation bar, select the menu item **SETTINGS > Company Settings > My Domain**.

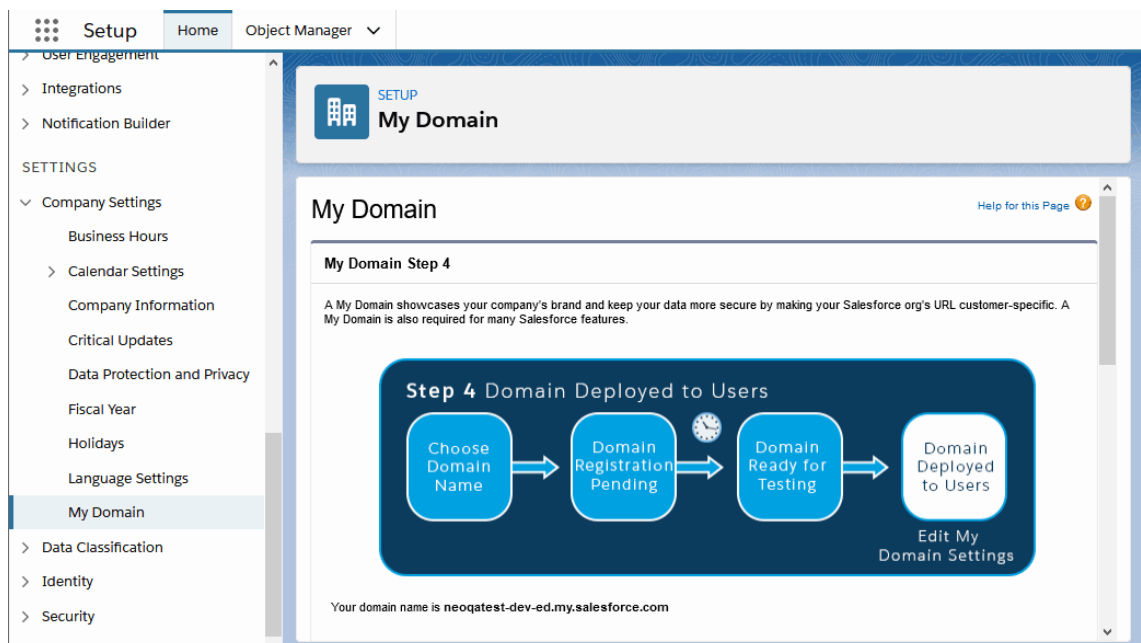


Fig. 11: Confirm my domain

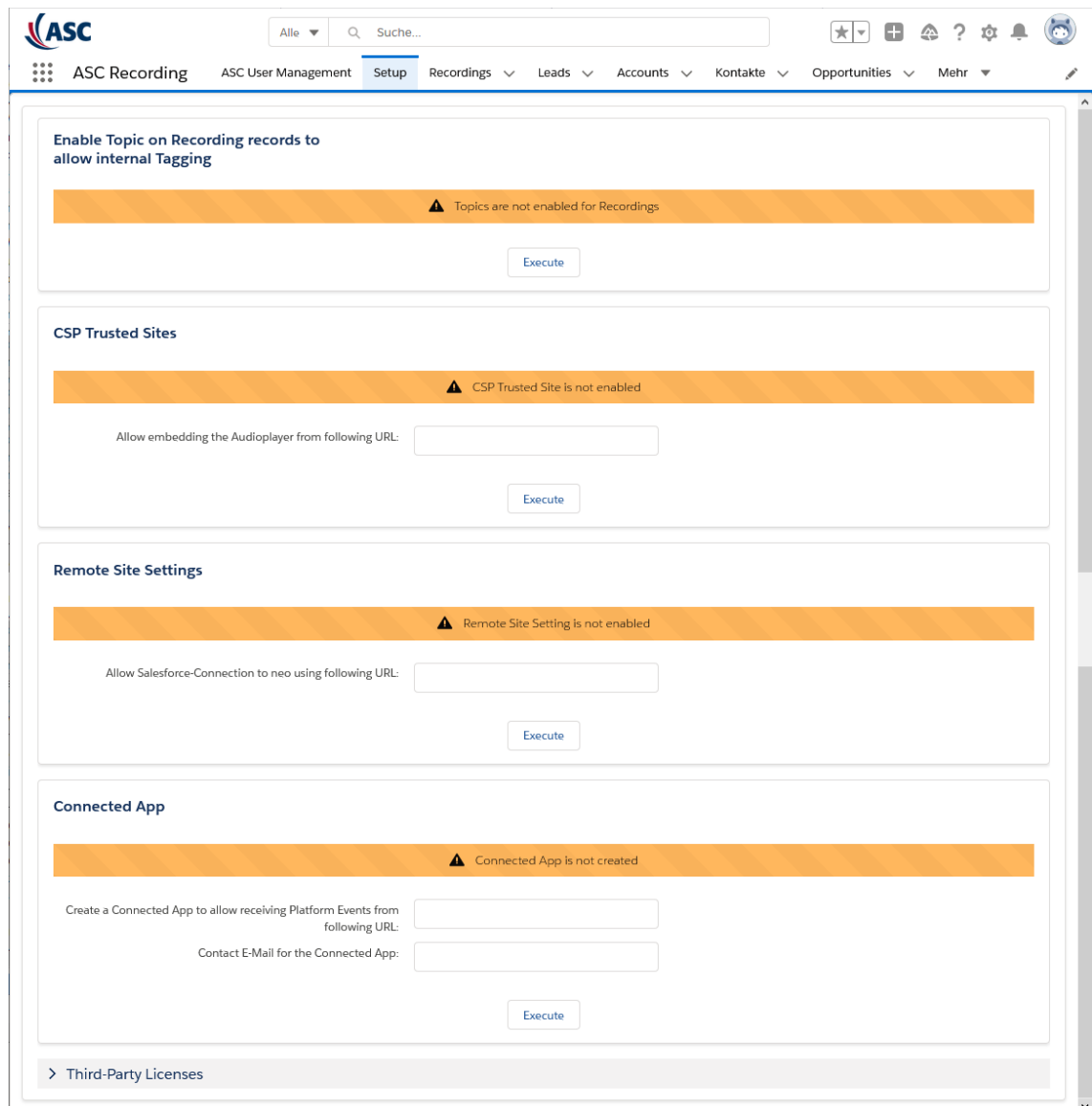
2. Check whether steps 1 to 4 have already been carried out during setup.
3. If the domain has not yet been deployed in step 4, carry out steps 1 through 4.

5.1.2 Automatically create application

In the latest version of the Salesforce application in the tab *Setup*, you can configure and establish connections. When entering the corresponding [URLs](#) and clicking on the button *Execute*, the configuration is carried out automatically.

To configure these parameters, you must log in as the system administrator of the Salesforce org.

1. Change to the tab *Setup*.
⇒ The parameters to configure the connection data appear.



The screenshot shows the Salesforce Setup interface with the 'Setup' tab selected. The navigation bar includes 'ASC Recording', 'ASC User Management', 'Setup', 'Recordings', 'Leads', 'Accounts', 'Kontakte', 'Opportunities', and 'Mehr'. The main content area displays four configuration sections, each with an orange error bar and an 'Execute' button:

- Enable Topic on Recording records to allow internal Tagging:** The error bar states 'Topics are not enabled for Recordings'.
- CSP Trusted Sites:** The error bar states 'CSP Trusted Site is not enabled'. Below it is a text input field for 'Allow embedding the Audioplayer from following URL:'.
- Remote Site Settings:** The error bar states 'Remote Site Setting is not enabled'. Below it is a text input field for 'Allow Salesforce-Connection to neo using following URL:'.
- Connected App:** The error bar states 'Connected App is not created'. Below it are two text input fields: 'Create a Connected App to allow receiving Platform Events from following URL:' and 'Contact E-Mail for the Connected App:'.

At the bottom, there is a link for '> Third-Party Licenses'.

Fig. 12: Tab Setup - Configure connections

Enable Topic on Recording records to allow internal Tagging

Enable Topic on Recording records to allow internal Tagging - Activate the option to allow internal tagging to the recordings

1. Click on the button *Execute* to execute the configuration.

CSP Trusted Sites

CSP Trusted Sites

Enter the [URL](#) from which the audio player is supposed to be integrated.

Click on the button *Execute*.

CSP Trusted Sites are created with all authorizations; if authorizations are supposed to be restricted, you can edit the CSP settings afterwards. For ASC purposes, only *media-src* is required.

1. CSP Trusted Sites are configured under *SETTINGS > Security > CSO Trusted Sites*.
2. Click on the button *Execute* to execute the configuration.

Remote Site Settings

Remote Site Settings

Enter the [URL](#) that is supposed to be used to connect the Salesforce application with the neo system.

1. Click on the button *Execute* to execute the configuration.

Connected App

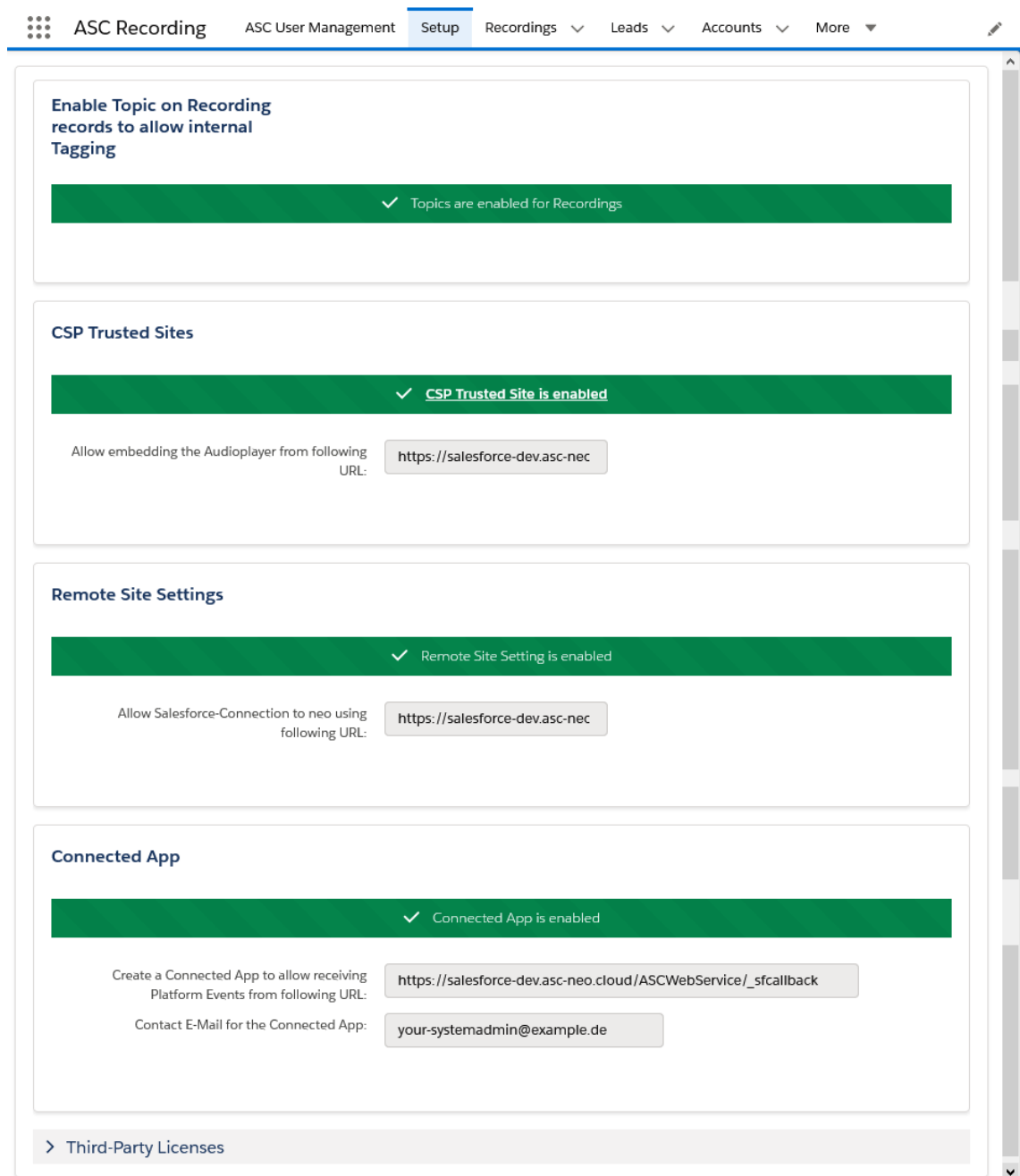
Create a Connected App to allow receiving Platform Events from following URL

Enter the ASCWebService Callback [URL](#) to create a connected app receiving the platform events.

Contact E-Mail for the Connected App:

Enter the e-mail address of the system administrator of the Salesforce org.

1. Click on the button *Execute* to execute the configuration.
 - ⇒ The new Connected App is created under the name ASC_NEO.
 - ⇒ The status indicators turn green.



The screenshot shows the 'Setup' tab in the ASC Recording interface. It contains four sections, each with a green status bar indicating successful configuration:

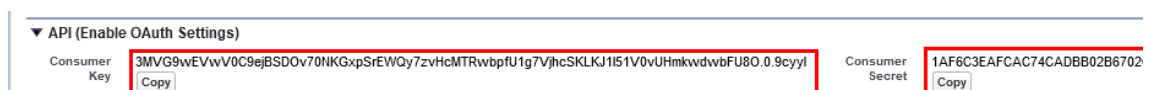
- Enable Topic on Recording records to allow internal Tagging:** Status bar shows 'Topics are enabled for Recordings'.
- CSP Trusted Sites:** Status bar shows 'CSP Trusted Site is enabled'. Below, it allows embedding the Audioplayer from the URL: `https://salesforce-dev.asc-nec`.
- Remote Site Settings:** Status bar shows 'Remote Site Setting is enabled'. Below, it allows Salesforce-Connection to neo using the URL: `https://salesforce-dev.asc-nec`.
- Connected App:** Status bar shows 'Connected App is enabled'. Below, it provides the URL for Platform Events: `https://salesforce-dev.asc-neo.cloud/ASCWebService/_sfcallback` and the contact email: `your-systemadmin@example.de`.

At the bottom, there is a link to 'Third-Party Licenses'.

Fig. 13: Tab Setup - Configured connections

Once the configuration of the connection data is complete and all status indicators are green, you can configure the required values in the Neo application.

2. Change to the path
Setup > Apps > App-Manager > Connected App.
3. Open the drop-down list of the *Connected App* ASC_NEO.
4. Click on the menu item *Display*.
⇒ You now see the following entries:



The screenshot shows the 'API (Enable OAuth Settings)' section of the Connected App configuration. It displays two fields:

- Consumer Key:** `3MVG9wEVwV0C9ejBSD0v70NKGxpSrEWQy7zvHcMTRwbpfU1g7VhcSKLKJ1I51V0vUHmkwdwbFU80.0.9cyyf`
- Consumer Secret:** `1AF6C3EAFAC74CADBB02B6702`

Both fields have a 'Copy' button next to them.

Fig. 14: Key and Secret of the Connected App

- `consumerkey = clientId`
- `consumer secret = client secret`

- Click on the button *Copy* to copy the values into the buffer and change to the Neo application to enter the data there, see [chapter "Configure Applications module", p. 61](#).

5.1.3 Manage licenses for installed packages

After setting up the new connected application, you must assign the users the licenses for the installed packages.

- In the navigation bar, select the menu item *PLATFORM TOOLS > Apps > Packaging > Installed Packages*.

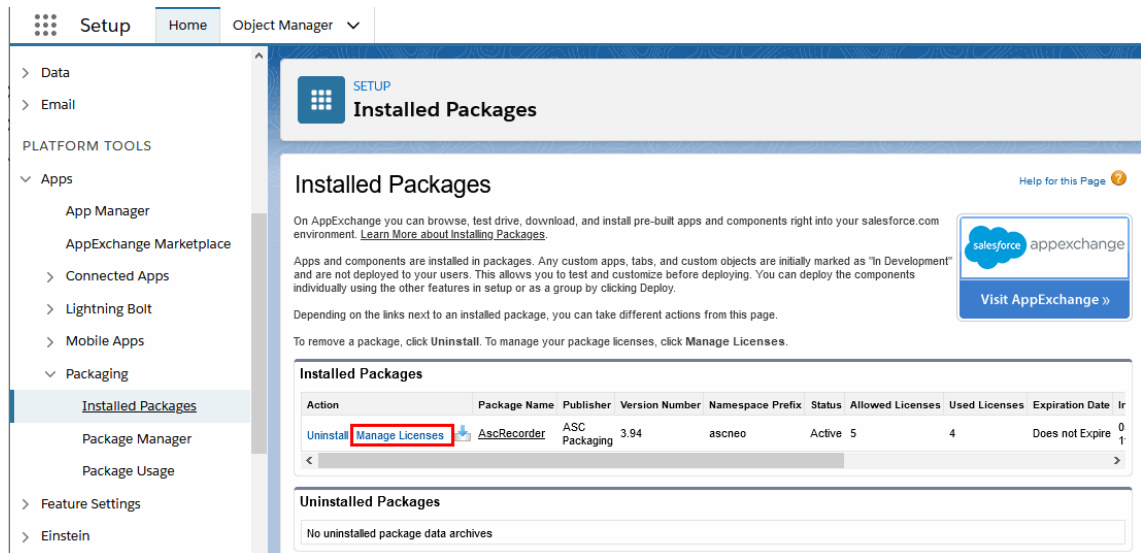


Fig. 15: Installed packages - license administration

- In the line of the package *AscRecorder*, click on the button *Manage Licenses*.
⇒ In the following dialog, the available users are displayed.

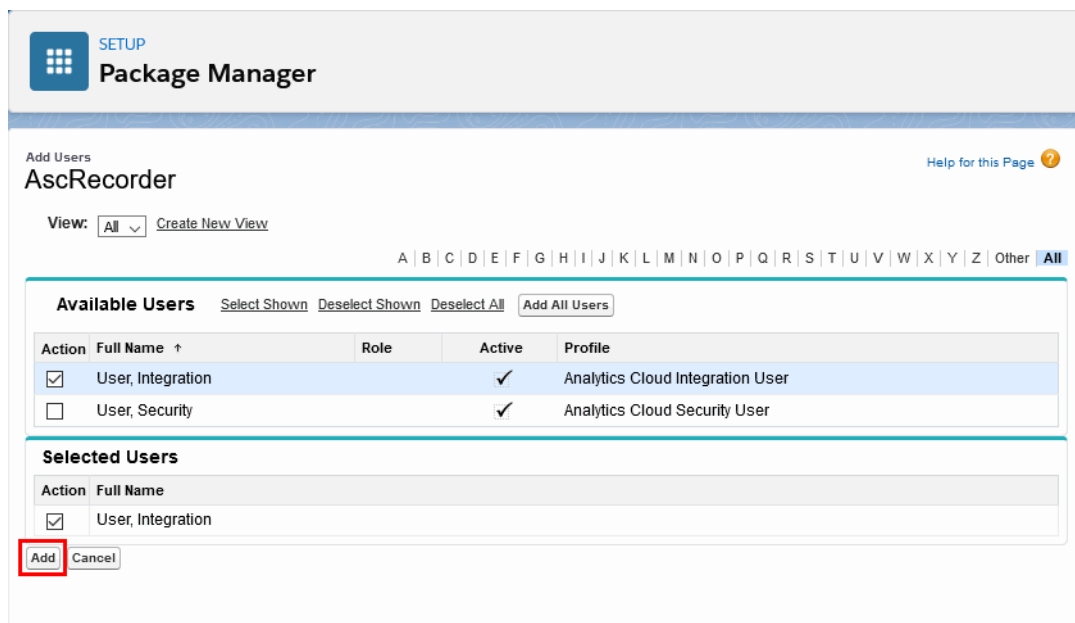


Fig. 16: Installed packages - add user

- Activate the check box in front of the users that you would like to assign the licenses to.
- Click on the button *Add*.
⇒ The users appear in the list of licensed users.

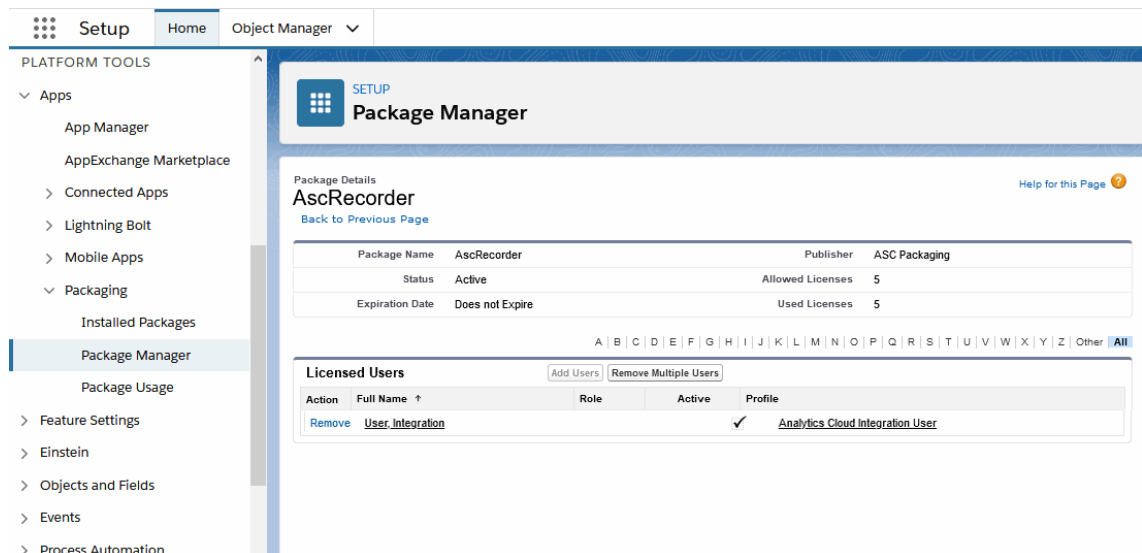


Fig. 17: Installed packages - add user

5.1.4 Assign permission sets

To enable users to work with the application, you must assign them permissions. Here, you can configure permissions for a permission set and assign them to users.

1. In the navigation bar, select the menu item **ADMINISTRATION > Users > Permission Sets**.

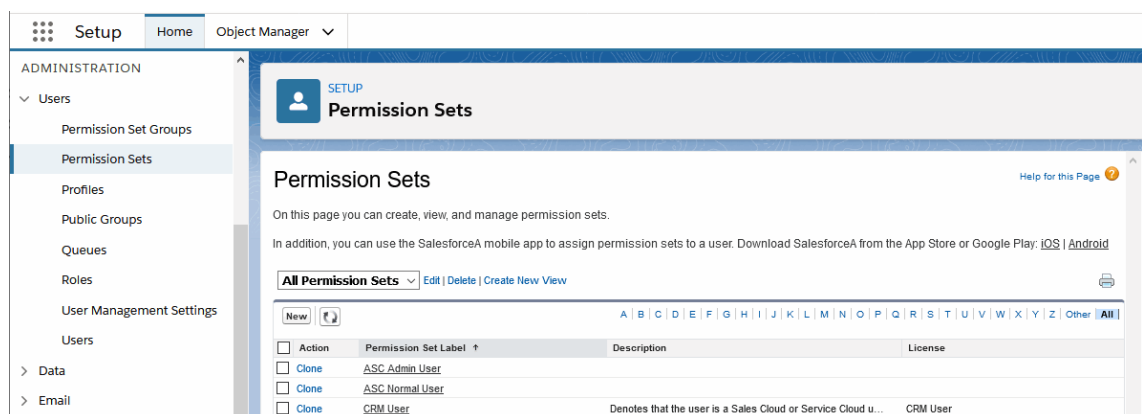


Fig. 18: Administration - Users - Create permission set

2. In the list, click on the entry **ASC Normal User** to assign users.
⇒ The permission set **ASC Normal User** opens.

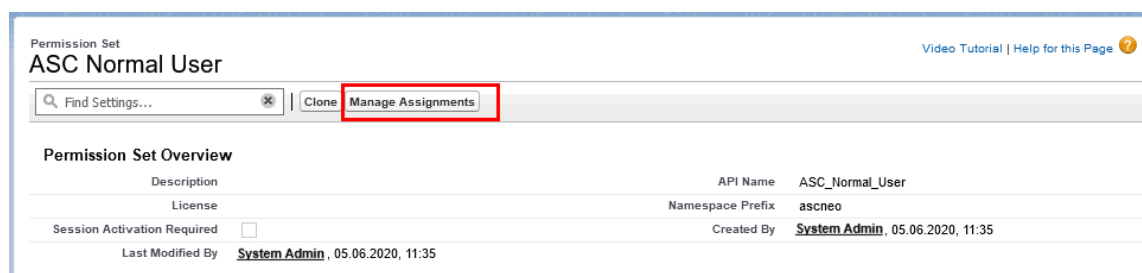


Fig. 19: Administration - Users - Permission sets Manage assignments

3. Click on the button **Manage Assignments**.
⇒ The list of already assigned users opens.

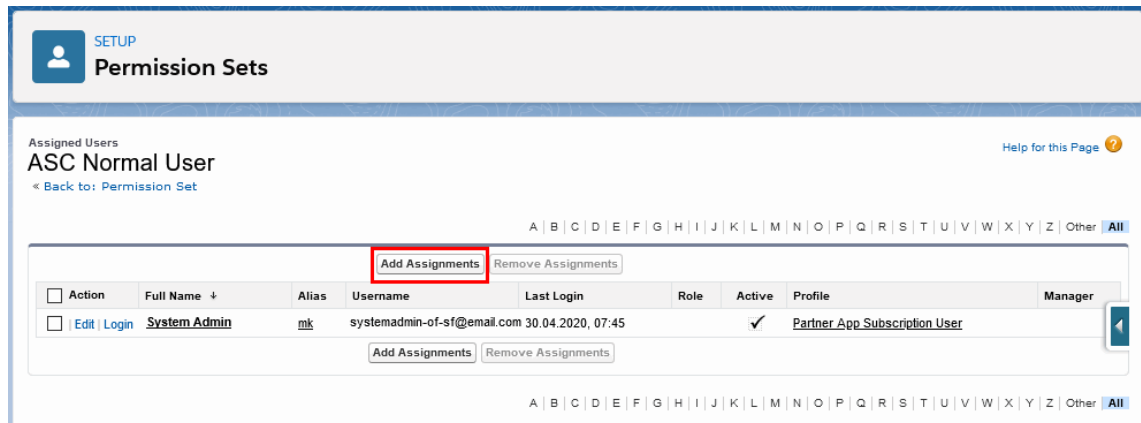


Fig. 20: Administration - Users - Permission sets Add assignments

4. Click on the button *Add Assignments* to add new users to this group *ASC Normal User*.
⇒ A list of available users opens.

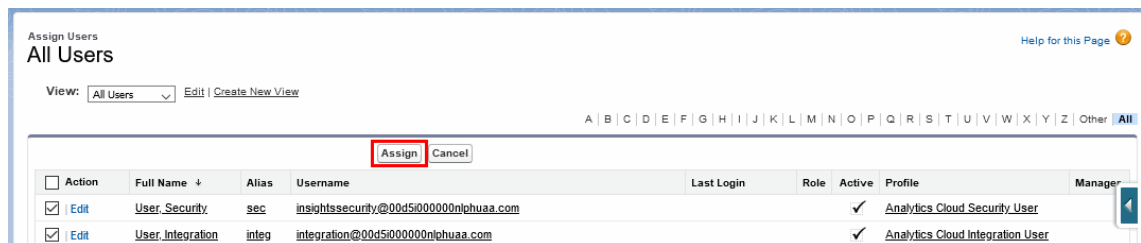


Fig. 21: Administration - Users - Assign permission sets (example)

5. Activate the check boxes in front of the users that you would like to assign in this group *ASC Normal User*.
6. Click on the button *Assign*.
⇒ A success notification appears and the users are displayed in the list.

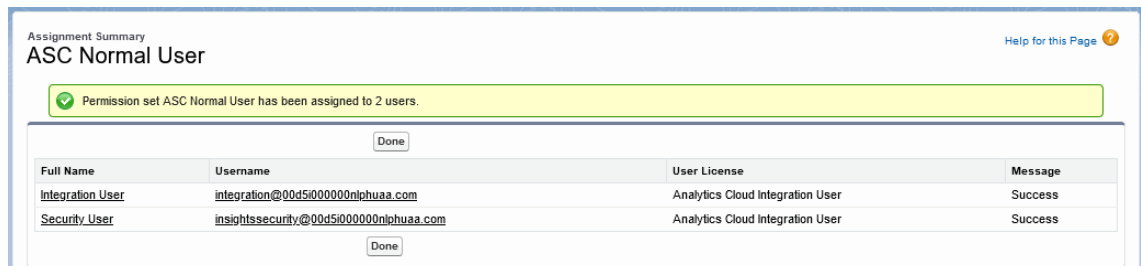
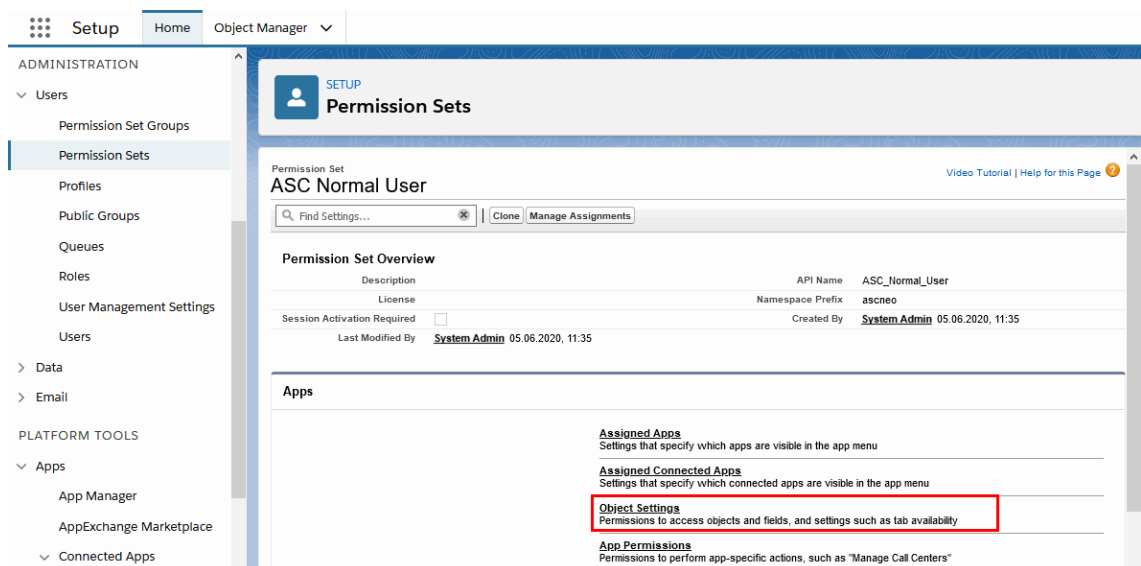


Fig. 22: Administration - Users - List of added users (example)

7. Click on the button *Done* to return to the main view.
8. Click on the entry *ASC Normal User* again to view the permission sets for the group.

Group field Apps

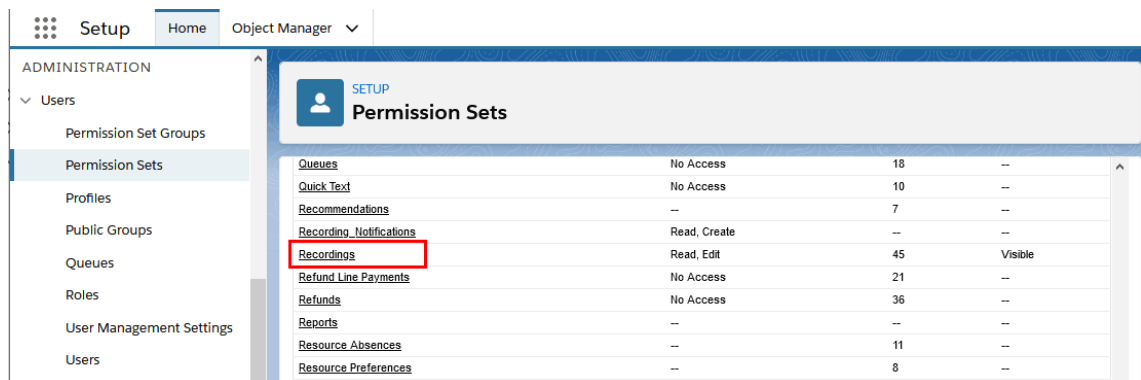
1. In the group field *Apps*, in the entry *Object Settings*, you can view the assigned permissions.



The screenshot shows the 'Permission Sets' page in the Salesforce Setup interface. The left sidebar contains the navigation menu with 'Setup' selected. The main content area displays the 'Permission Set Overview' for the 'ASC Normal User'. The overview includes fields for Description, License, API Name (ASC_Normal_User), Namespace Prefix (ascneo), Session Activation Required (checkbox), Created By (System Admin), and Last Modified By (System Admin). Below the overview, there are sections for 'Apps', 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings' (highlighted with a red box), and 'App Permissions'.

Fig. 23: Administration - Check permissions for objects

2. Click on the button *Object Settings*.
⇒ The list of permission sets appears.



The screenshot shows the 'Object Settings' table in the Salesforce Setup interface. The table lists various objects and their corresponding permissions. The 'Recordings' row is highlighted with a red box.

Object	Permissions	Count	Visible
Queues	No Access	18	--
Quick Text	No Access	10	--
Recommendations	--	7	--
Recording Notifications	Read, Create	--	--
Recordings	Read, Edit	45	Visible
Refund Line Payments	No Access	21	--
Refunds	No Access	36	--
Reports	--	--	--
Resource Absences	--	11	--
Resource Preferences	--	8	--

Fig. 24: Administration - Call up permissions for recordings

3. Click on the entry *Recordings*.

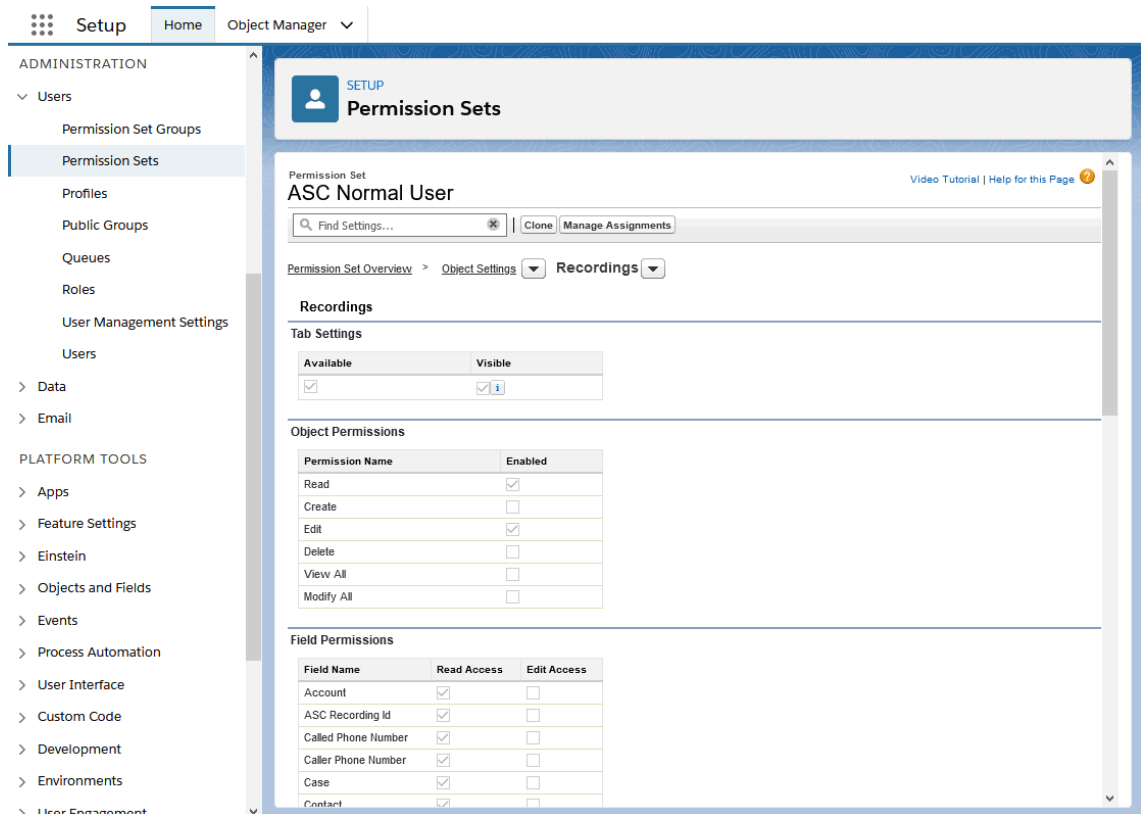


Fig. 25: Administration - Display permissions for recordings

- Here, you see the permissions of the users of the group *ASC Normal User* for recording.

5.1.5 Assign permissions for flows

To enable users to load information about and transcripts of recordings, you must configure permissions for flows.

There are 2 options to configure flows:

- Configure flow for a certain user, see [chapter "Activate flow for certain users", p. 21](#).
- Configure flow for usage across the system by means of a permission set group see [chapter "Activate flow for users of a certain permission set group", p. 23](#).

5.1.5.1 Activate flow for certain users

To enable individual users to load information about or transcripts of recordings, you as administrator can activate a selected user as *Flow User*.

- To do so, change to *Setup > ADMINISTRATION > Users > Users*.
- Click on the button *Edit* in front of the respective user.

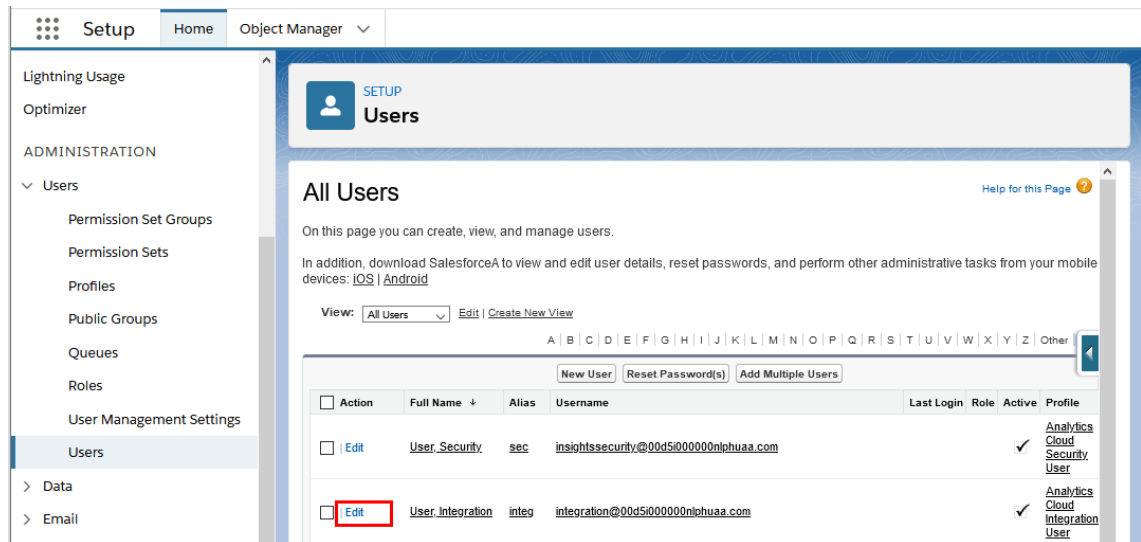


Fig. 26: Select user to grant permission

3. In the section *General Information*, activate the option *Flow User*.

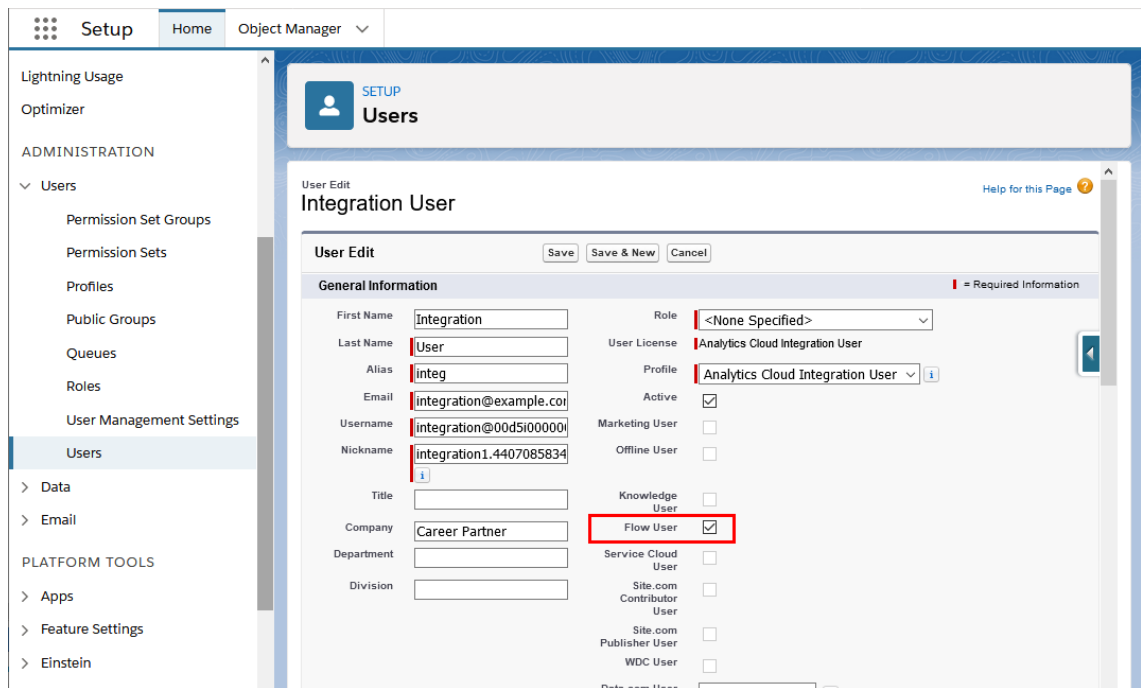


Fig. 27: Activate user a flow user

4. Click on the button **Save** to apply the settings.
 - ⇒ In the tab *Recordings*, the following buttons are now displayed:
 - *Load Additional Data*
 - *Load Transcript*

By clicking on these buttons, users can now load the additional data and the transcripts of their recordings.

As an alternative to granting permissions to each user separately, you can create a new permission set group which enables users across the system belonging to this group to run all flows, see [chapter "Activate flow for users of a certain permission set group", p. 23](#).

5.1.5.2 Activate flow for users of a certain permission set group

To enable a group of certain users to load information about or transcripts of recordings, you as administrator can create a new permission set group containing the option *Run Flows* that you then assign certain users to.

1. Change to the section *Setup > ADMINISTRATION > Users > Permission Set Groups*.
2. Click on the button *New Permission Set Group* to create a new permission set group.
3. Enter a name for the group.
4. Click on the button *Save*.
5. Click on the menu item *System Permissions* within this new permission set group.

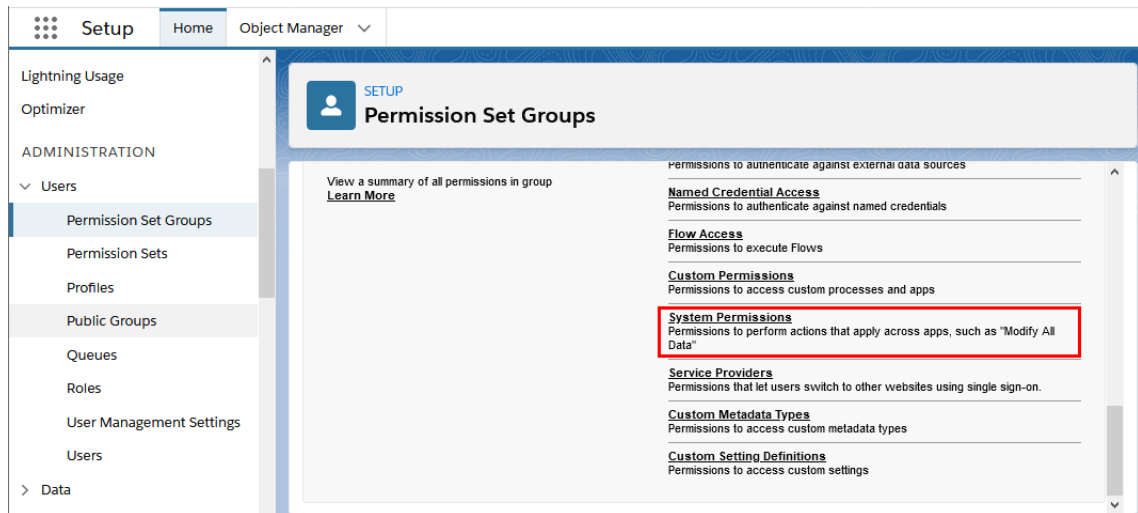


Fig. 28: Edit system permissions

6. Scroll down to the option *Run Flows* and activate it.

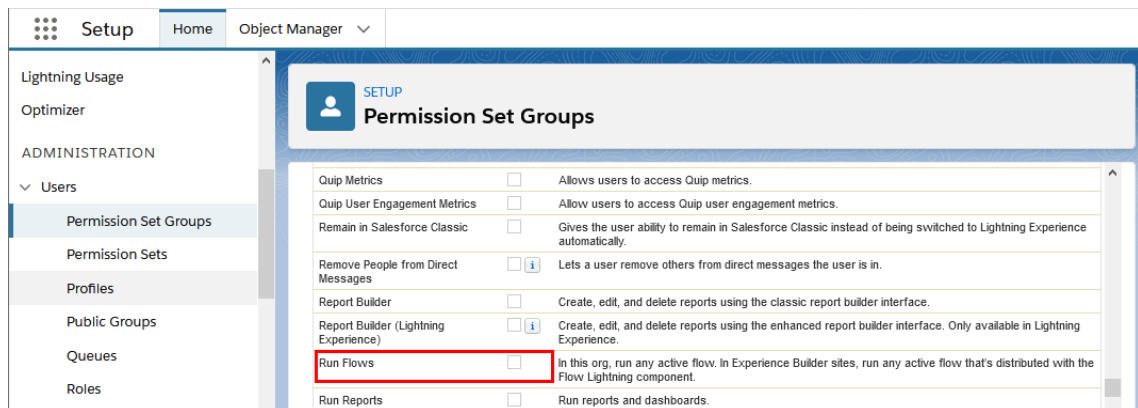


Fig. 29: Permission Set Group - Run Flows - activate

7. Assign users to the new permission set group who are supposed to be granted permissions.
8. Call up the new permission set group, in the example *Run_Flow*.

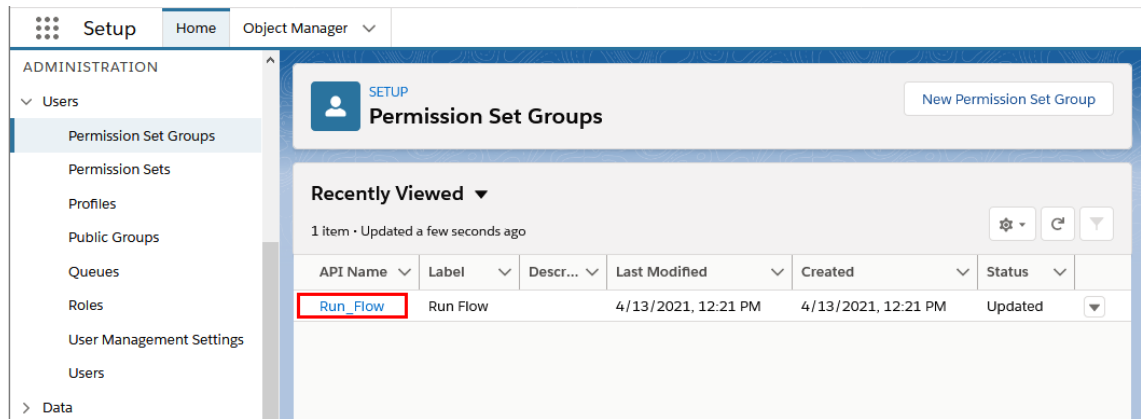


Fig. 30: Assign permission set groups

9. Click on the button *Manage Assignments*.

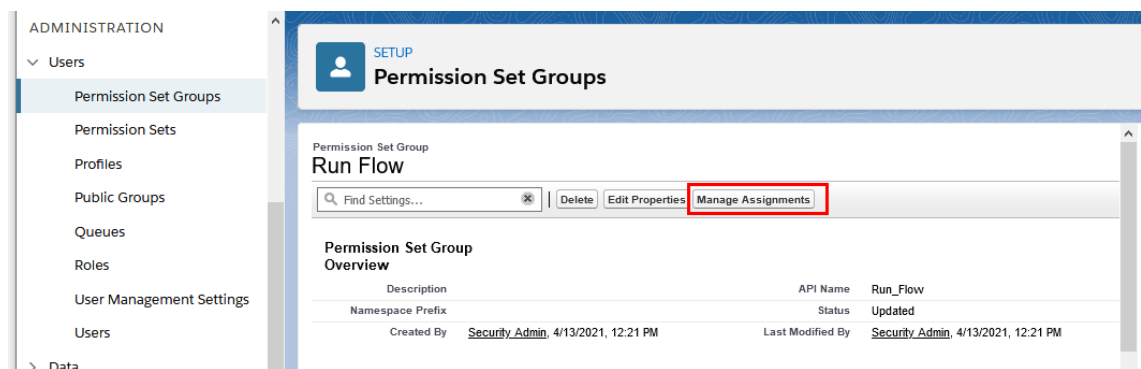


Fig. 31: Manage assignments

10. Click on the button *Add Assignments*.

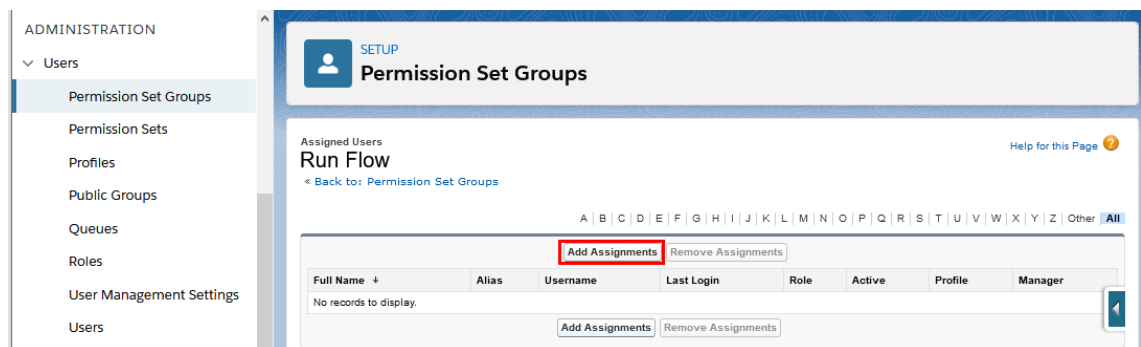


Fig. 32: Add assignments

11. From the list of users, select the respective users and activate the check box in front of them.

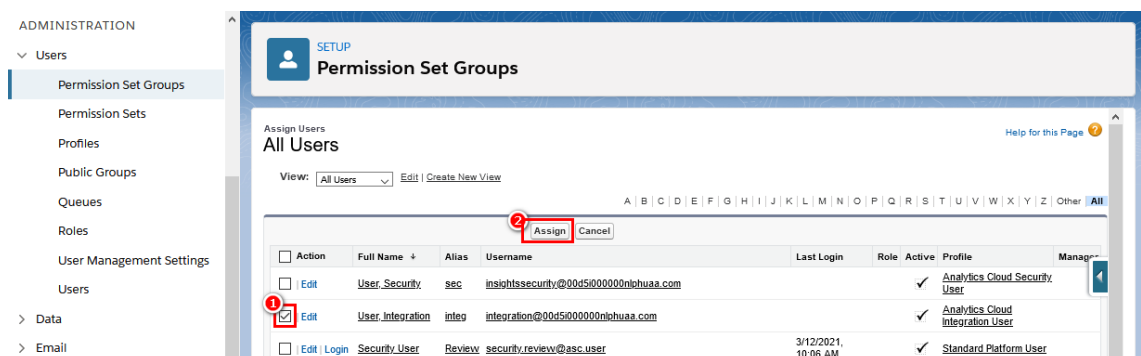


Fig. 33: Assign users to permission set group

12. Click on the button *Assign*.



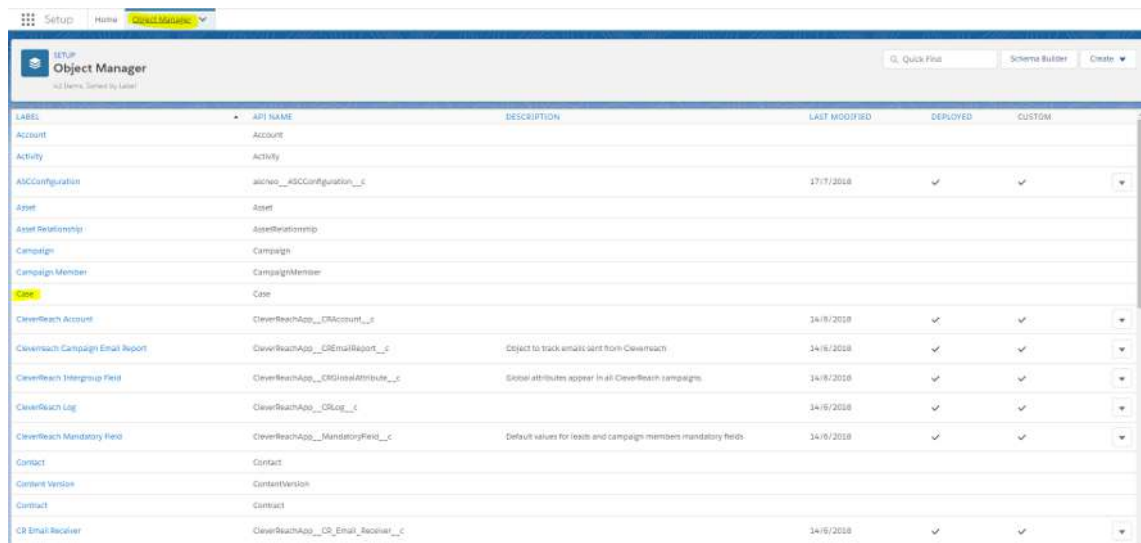
Please note that by activating the option *Run Flows*, all users belonging to this group will be granted permission to run all flows in the organization. It is possible that this may not be intended in your organization. If you would like to restrict the function to the flows of the recordings of the respective user, you must activate the respective user as flow user in the configuration of the user, see [chapter "Activate flow for certain users", p. 21](#).

5.1.6

Assign page layout

In the Object Manager, you can configure a page layout.

1. Click on the tab *Object Manager*.
2. Select the menu item *Case* in the navigation bar.

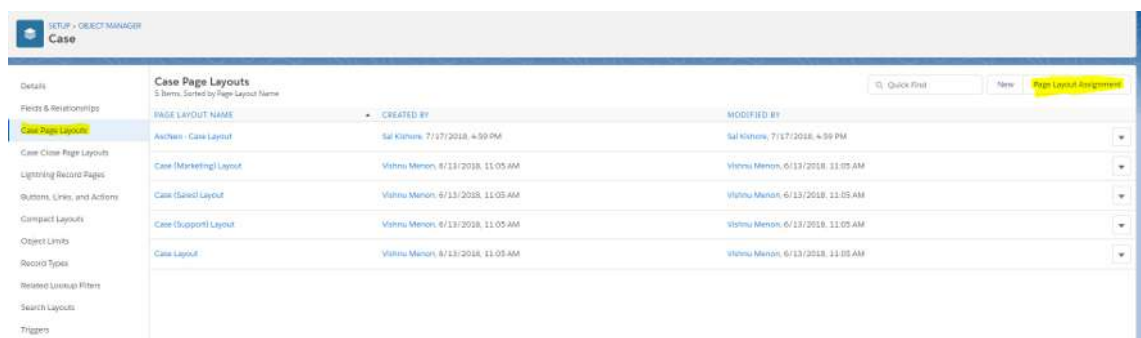


Labels	API Name	Description	Last Modified	Deployed	Custom
Account	Account				
Activity	Activity				
ASCConfiguration	ascneo__ascconfiguration__c		17/7/2018	✓	✓
Asset	Asset				
Asset Relationship	AssetRelationship				
Campaign	Campaign				
Campaign Member	CampaignMember				
Case	Case				
CleverReach Account	CleverReachApp__CRAccount__c		14/8/2018	✓	✓
CleverReach Campaign Email Report	CleverReachApp__CREmailReport__c	Object to track emails sent from CleverReach	14/8/2018	✓	✓
CleverReach Intergroup Field	CleverReachApp__CRIntergroupField__c	Global attributes appear in all CleverReach campaigns	14/8/2018	✓	✓
CleverReach Log	CleverReachApp__CRLog__c		14/8/2018	✓	✓
CleverReach Mandatory Field	CleverReachApp__MandatoryField__c	Default values for leads and campaign members mandatory fields	14/8/2018	✓	✓
Contact	Contact				
Content Version	ContentVersion				
Contract	Contract				
CR Email Receiver	CleverReachApp__CR_Email_Receiver__c		14/8/2018	✓	✓

Fig. 34: Project Manager - Case

3. Select the menu item *Page Layouts* in the navigation bar.

⇒ A list with *case page layouts* appears.



Page Layout Name	Created By	Modified By
AvXneo - Case Layout	Sal Kishore, 7/17/2018, 4:59 PM	Sal Kishore, 7/17/2018, 4:59 PM
Case (Marketing) Layout	Vishnu Menon, 6/13/2018, 11:05 AM	Vishnu Menon, 6/13/2018, 11:05 AM
Case (Sales) Layout	Vishnu Menon, 6/13/2018, 11:05 AM	Vishnu Menon, 6/13/2018, 11:05 AM
Case (Support) Layout	Vishnu Menon, 6/13/2018, 11:05 AM	Vishnu Menon, 6/13/2018, 11:05 AM
Case Layout	Vishnu Menon, 6/13/2018, 11:05 AM	Vishnu Menon, 6/13/2018, 11:05 AM

Fig. 35: Case - Page layout - Assign page layouts

4. Click on the button *Page Layout Assignment* in the top right corner.

⇒ The list displays the already assigned page layouts.

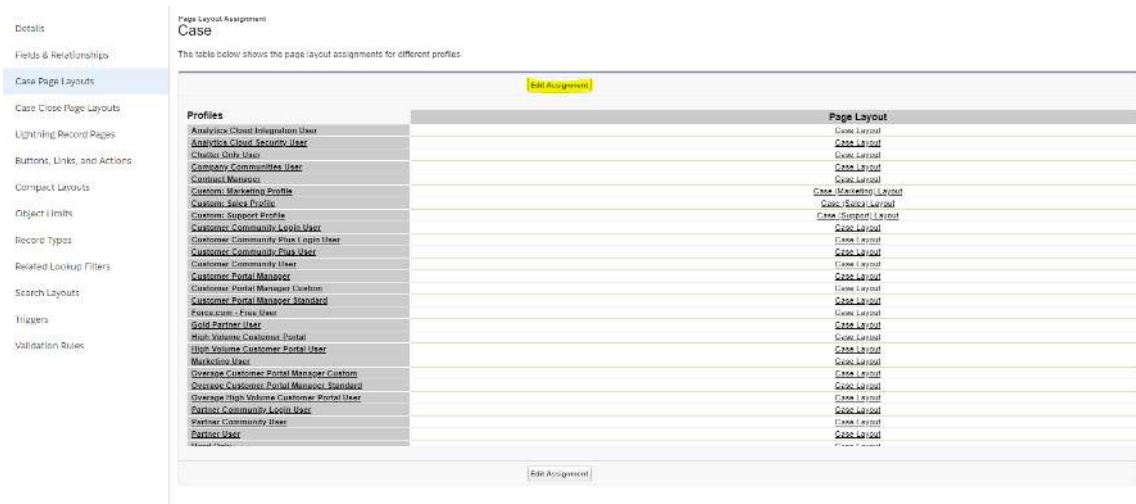


Fig. 36: Page layouts - Edit assignment

5. Click on the button *Edit Assignment*.
 ⇒ A list containing profiles appears.

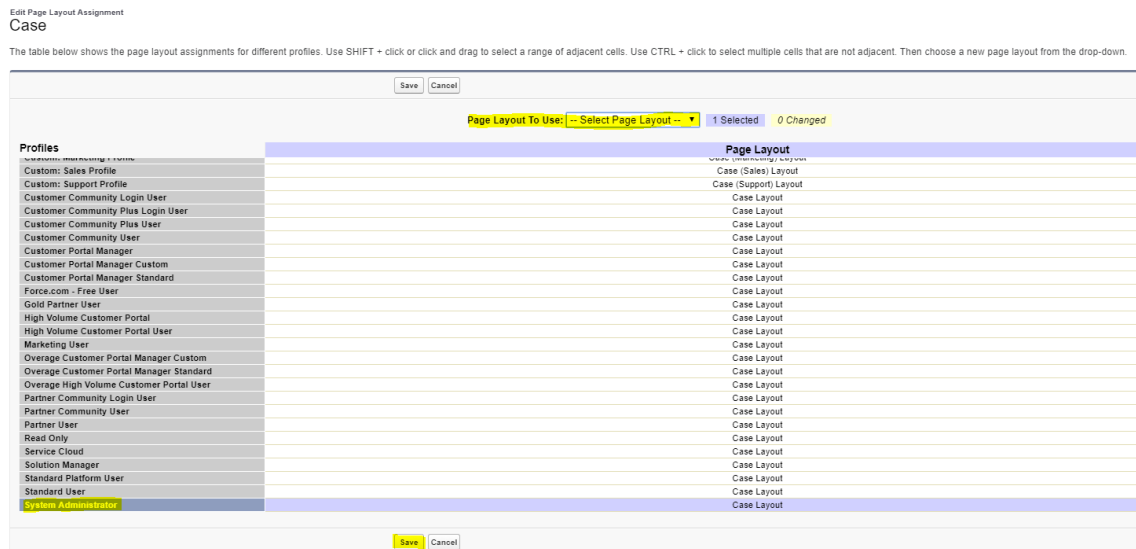


Fig. 37: Assign page layout

6. Select the respective profile.
7. In the drop-down list, select the page layout which is supposed to be used.
8. Click on the button *Save*.
 ⇒ The profile and the page layout of the user now appear in the list.

5.1.7 Configure tagging permission

To grant users access to the tagging fields, you must set permissions.

1. In the navigation bar, select the menu item
ADMINISTRATION > Users > Permission Sets.

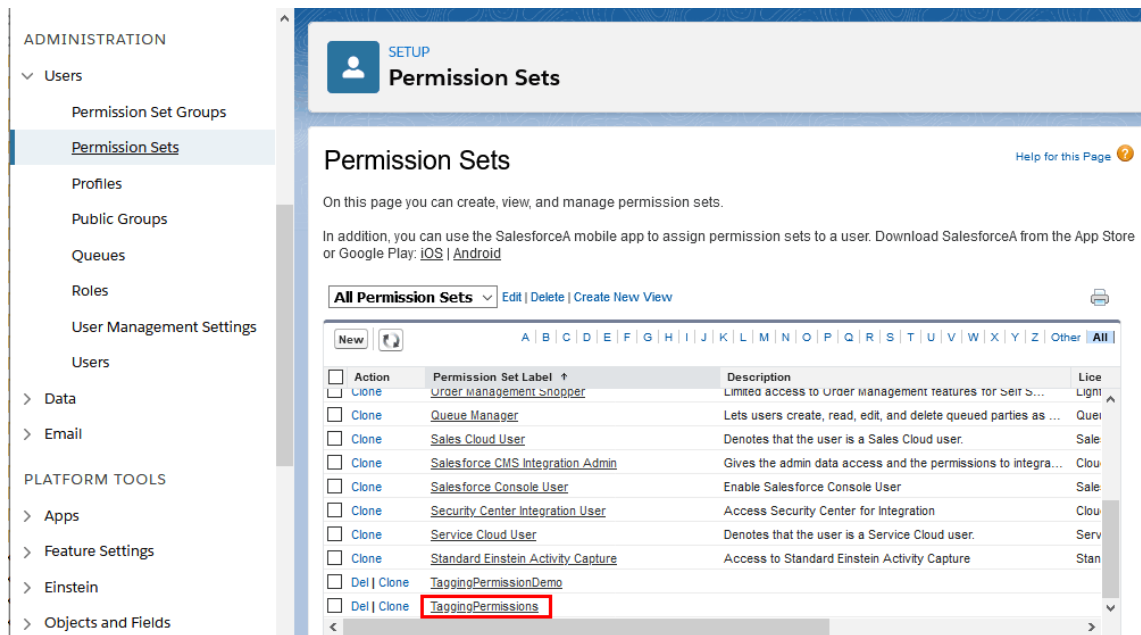


Fig. 38: Administration - Users - Permission Sets - TaggingPermissions

- Click on the entry *TaggingPermissions*. If the entry does not yet exist, click on *New* to create it.

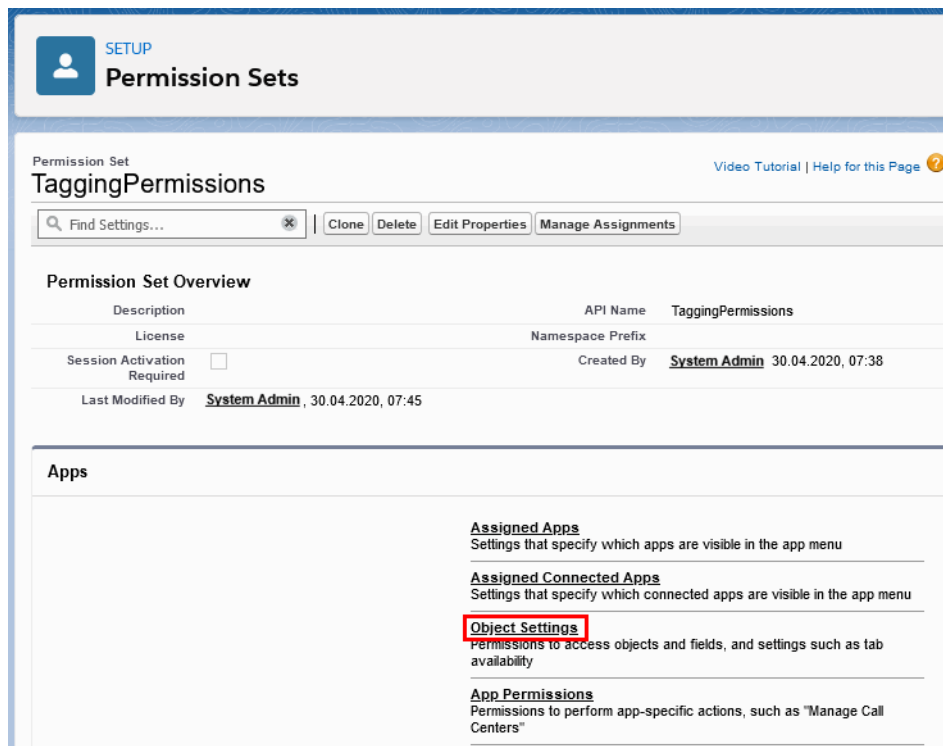


Fig. 39: Permission sets - call up tagging permissions

- Click on the menu item *Object Settings*.


 SETUP Permission Sets			
Queues	No Access	18	--
Quick Text	No Access	10	--
Recommendations	--	7	--
Recording Notifications	No Access	--	--
Recordings	No Access	45	--
Refund Line Payments	No Access	21	--
Refunds	No Access	36	--
Reports	--	--	--
Resource Absences	--	11	--
Resource Preferences	--	8	--
Return Order Item Adjustments	--	6	--

Fig. 40: Permission sets - set TaggingPermission for recordings

4. Click on the entry *Recordings*.

Permission Set
TaggingPermissions [Video Tutorial](#) | [Help for this Page](#) ?

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > Object Settings ▾ Recordings ▾

Recordings **Edit**

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/> i

Object Permissions

Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

Fig. 41: Permission sets - edit tagging permission

5. Click on the button *Edit* to set the permissions.

Permission Set
TaggingPermissions [Video Tutorial](#) | [Help for this Page](#) ?

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > Object Settings | Recordings

Recordings | Save | Cancel

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> i

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

Field Name	Read Access	Edit Access
Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ASC Recording Id	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Called Phone Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Caller Phone Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Case	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
customCP01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
customCP02	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
customCP03	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Fig. 42: Permission sets - edit tagging permission

6. Enable access to the customCP fields that you would like to make available for users to be edited.
7. Click on the button **Save** to apply the settings.

5.1.8 Change label for customCP fields

To help users to quickly see which information is supposed to be entered in which customCP field, you can change the labels of the fields.

1. In the navigation bar, select the menu item
PLATFORM TOOLS > User Interface > Translation Workbench > Override.

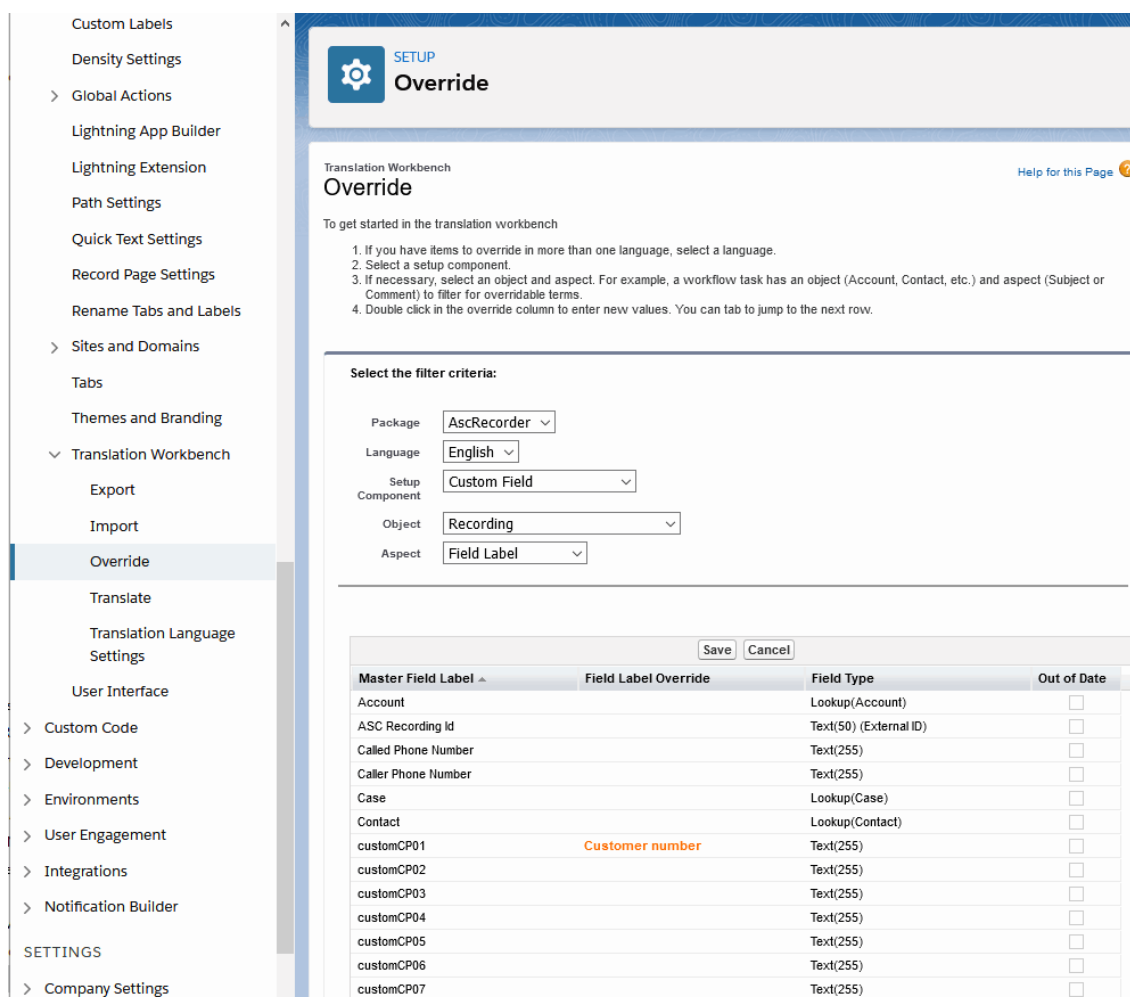


Fig. 43: User Interface - Translation Workbench - Override field label

2. Select the filter criteria in the above section:

Package	Select the package <i>AscRecorder</i> in which the field labels are available.
Language	From the drop-down list, select the language in which you would like to change the label.
Setup Component	Select the entry <i>Custom Field</i> from the drop-down list.
Object	From the drop-down list, select the entry <i>Recording</i> .
Aspect	From the drop-down list, select the entry <i>Field Label</i> .

Tab. 2: Filter criteria for field labels

- By double-clicking on the field, you can activate editing mode.
- Subsequently, click on the pen icon and change the label of the respective field.
- Click on the button *Save* to apply the settings.
 - ⇒ The success notification confirms the process.

Select the filter criteria:

Package:

Language:

Setup Component:

Object:

Aspect:

✓ Your changes have been saved

Master Field Label	Field Label Override	Field Type	Out of Date
Account		Lookup(Account)	<input type="checkbox"/>
ASC Recording Id		Text(50) (External ID)	<input type="checkbox"/>
Called Phone Number		Text(255)	<input type="checkbox"/>
Caller Phone Number		Text(255)	<input type="checkbox"/>
Case		Lookup(Case)	<input type="checkbox"/>
Contact		Lookup(Contact)	<input type="checkbox"/>
customCP01	Customer number	Text(255)	<input type="checkbox"/>
customCP02		Text(255)	<input type="checkbox"/>

Fig. 44: User Interface - Translation Workbench - Override field label

The fields appear in the user interface in the section *ASC User Management* and can now be made available.

5.1.9 Configure page layout

In the Object Manager, you can configure a page layout.

1. In the setup, select the tab *Object Manager*.

Setup Home **Object Manager**

101+ Items, Sorted by Label

Object Name	Object Label	Object Type	Last Modified	Status	Actions
Queue Messaging Template	LocWaitlistMsgTemplate	Standard Object			
Queued Party	LocationWaitlistedParty	Standard Object			
Quick Text	QuickText	Standard Object			
Recommendation	Recommendation	Standard Object			
Recording	ascneo__Recording__c	Custom Object	05.06.2020	✓	<div> Edit Delete Edit </div>
Refund	Refund	Standard Object			
Refund Line Payment	RefundLinePayment	Standard			

Fig. 45: Object Manager - Edit recording object

2. Scroll down to the entry *Recording* and select the entry *Edit* by opening the drop-down list at the end of the line.

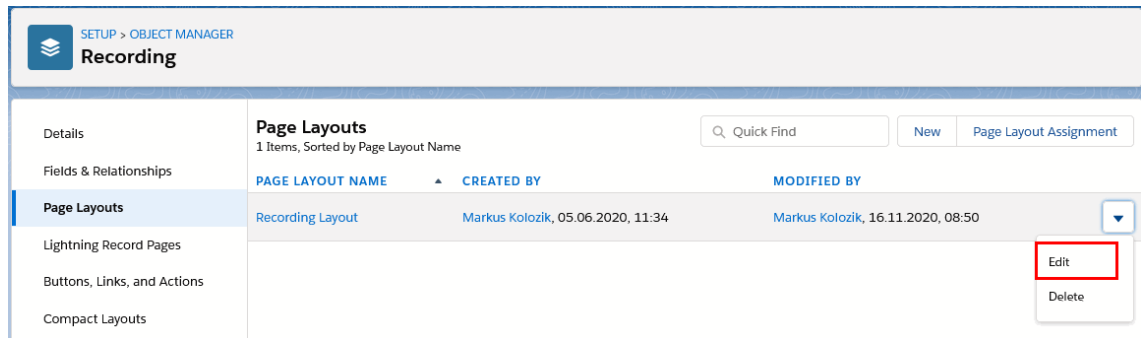


Fig. 46: Page Layouts - Recording Layout - Call up editing mode

3. Select the menu item *Page Layouts* in the navigation bar.
4. Select the entry *Edit* by opening the drop-down list at the end of the line of the existing Recording Layout.

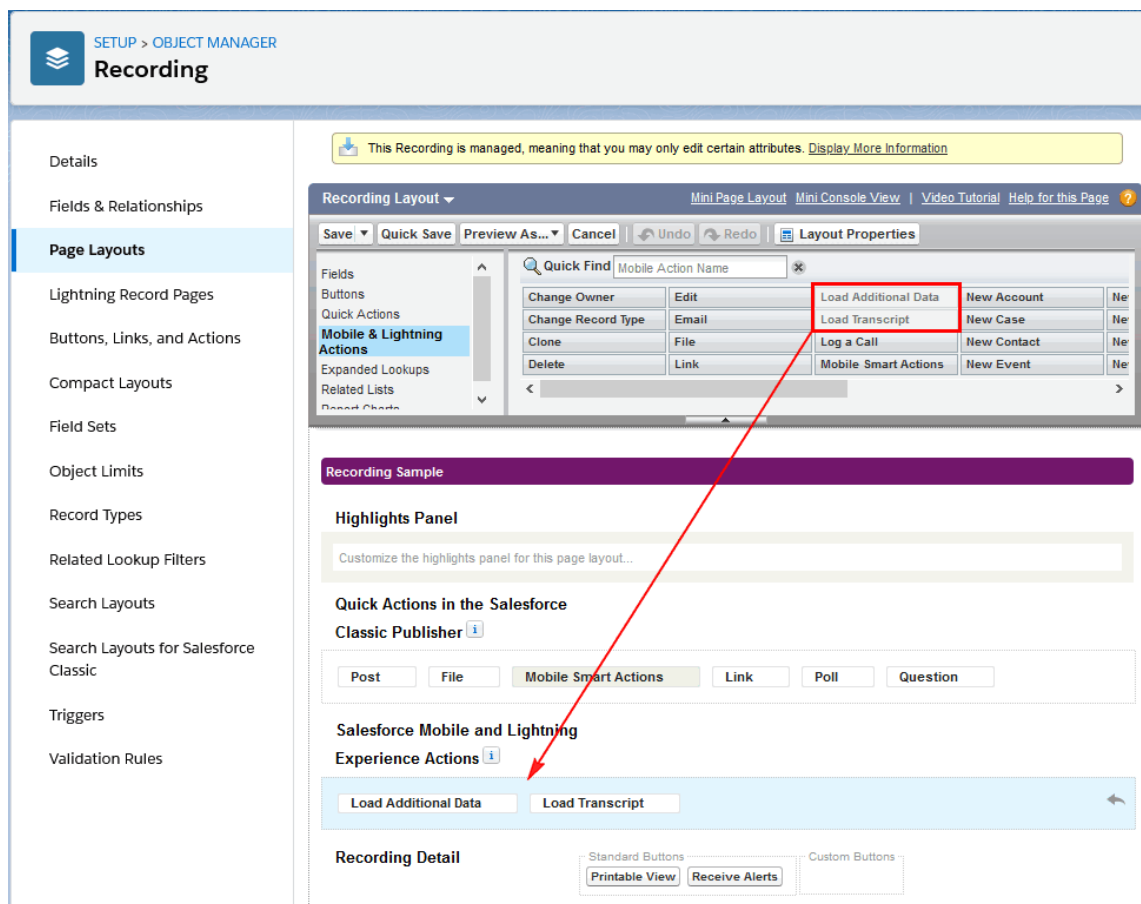


Fig. 47: Recording Layout - Configure fields for Mobile and Lightning Experience

5. In the list in the upper group field *Recording Layout*, select the entry *Mobile & Lightning Actions*.
 - ⇒ The available buttons are displayed.
6. Use drag and drop to move the respective buttons to the group field *Salesforce Mobile and Lightning Experience Actions*.
7. The fields for the general additional data which are always available such as phone number and call direction as well as the custom CP fields have been preconfigured and must not be added.

Salesforce Mobile and Lightning Experience Actions ⓘ

Load Additional Data Load Transcript

Recording Detail

Standard Buttons Custom Buttons

Printable View Receive Alerts

Information (Header visible on edit only)

Recording Name	GEN-2004-001234	Owner	Sample Text
ASC Recording Id	Sample Text	Lead	Sample Text
Contact	Sample Text	Account	Sample Text
Opportunity	Sample Text	Case	Sample Text
Topics	Sample Text		
Start Time	25.11.2020, 13:54		
Direction	Sample Text		
Caller Phone Number	Sample Text		
Called Phone Number	Sample Text		

Tagging Information

customCP01	Sample Text	customCP02	Sample Text
customCP03	Sample Text	customCP04	Sample Text
customCP05	Sample Text	customCP06	Sample Text
customCP07	Sample Text	customCP08	Sample Text
customCP09	Sample Text	customCP10	Sample Text
customCP11	Sample Text	customCP12	Sample Text
customCP13	Sample Text	customCP14	Sample Text
customCP15	Sample Text	customCP16	Sample Text
customCP17	Sample Text	customCP18	Sample Text
customCP19	Sample Text	customCP20	Sample Text
customCP21	Sample Text	customCP22	Sample Text
customCP23	Sample Text	customCP24	Sample Text
customCP25	Sample Text	customCP26	Sample Text
customCP27	Sample Text	customCP28	Sample Text
customCP29	Sample Text	customCP30	Sample Text

Fig. 48: Recording Layout - Default fields for tagging

8. In the above group field, click on the button **Save** to save the current configuration.

⇒ The buttons appear in the recoding layout in the tab *Recordings*.

To enable users to use these buttons, you must activate the permission sets for flows for these users, see [chapter "Assign permissions for flows", p. 21](#).

5.2

System Configuration

To enable the Salesforce application to be used, configure the Neo system in the application System Configuration as follows.

- *Configure Tenants module*
Assign extensions, configure Web Service
- *Configure Employees module*
Assign extensions, configure individual function rights
- *Configure Servers module*
Configure API Server
- *Configure PBX module*
Create PBX, activate PHONEapp
- *Configure PHONEapp module*
Configure PHONEapp
- *Configure Phones module*
Configure phones
- *Configure Additional Data module*
Activate additional data as available and editable
- *Configure Recording Planner (carry out as 1st-tenant-admin)*
Configure recording profile for calls and activate it

- *Configure Applications module (carry out as 1st-tenant-admin)*
Set up Salesforce application and activate it



Basic information about using the application System Configuration can be found in the user manual for administrators *System Configuration - General information*.

5.2.1 Start application

During the installation, shortcuts for the Neo applications are created on the computer desktop.

1. To start the application directly on the server, double-click on the shortcut System Configuration.

To access the application from a computer via the web, enter the following URL in the address bar of the browser:

https://<System-IP>/SystemConfiguration.

If you have configured customer-specific ports, you must add the port in the URL:

https://<System-IP>:<Port>/SystemConfiguration.

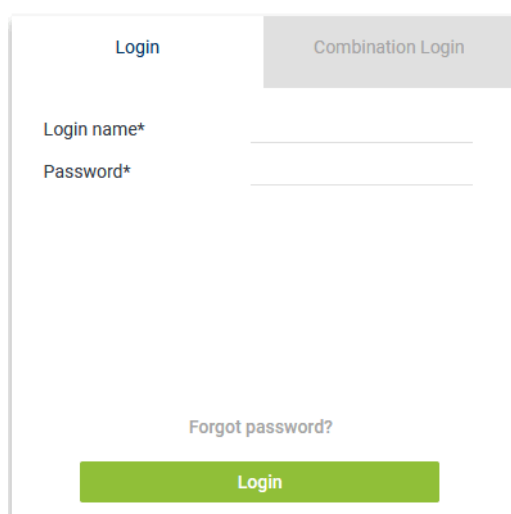


Fig. 49: System Configuration - Web interface

To install and configure the recording solutions, you have to log in as system provider.

Login data for the administrator of the system provider:

User name:	<i>system-admin</i>
Neo version < 6.3	
Default password:	<i>1</i>
	If the default password <i>1</i> has never been changed before a software update to a Neo version ≥ 6.3 , the password must be changed upon the next login or by entering it again. If the default password has already been changed before a software update to a Neo version ≥ 6.3 , the changed password remains.
Neo version ≥ 6.3	
Default password:	<i>A\$c123</i>

Tab. 3: Login data - system provider

2. Log in to the web interface.
⇒ The main window System Configuration appears.

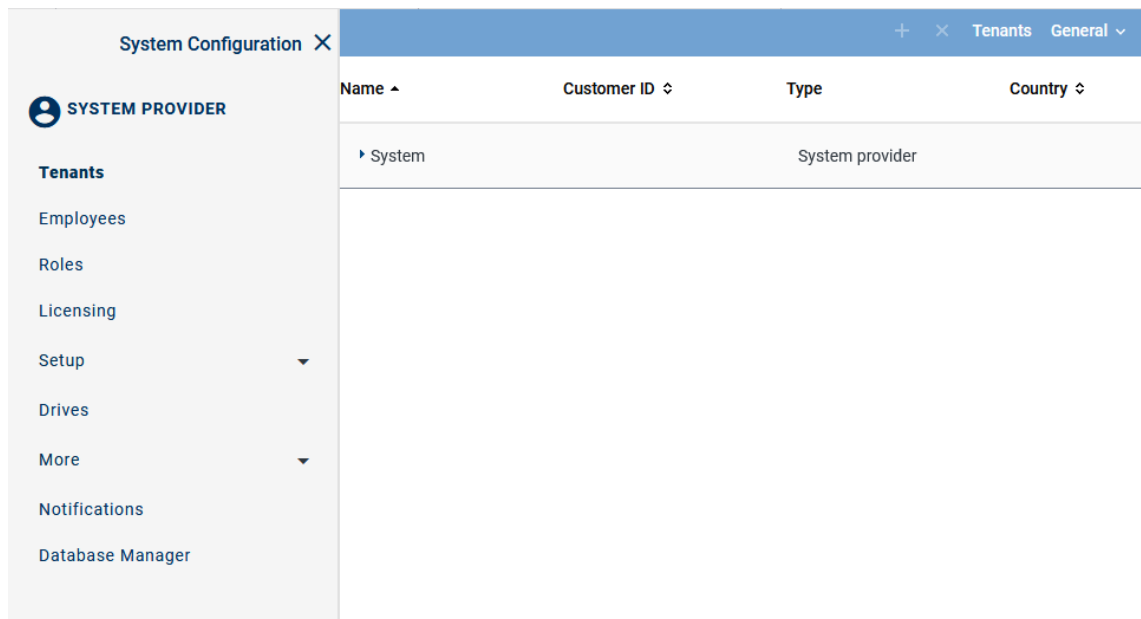


Fig. 50: System Configuration - main view

5.2.2 Configure Tenants module

For the communication between the recording server and the Salesforce application, carry out the following configuration in the Tenants module:

- *Assign extensions (in multi-tenant systems)*
 - *Set up Web Service*
1. Select the menu item *Tenants* in the navigation bar.

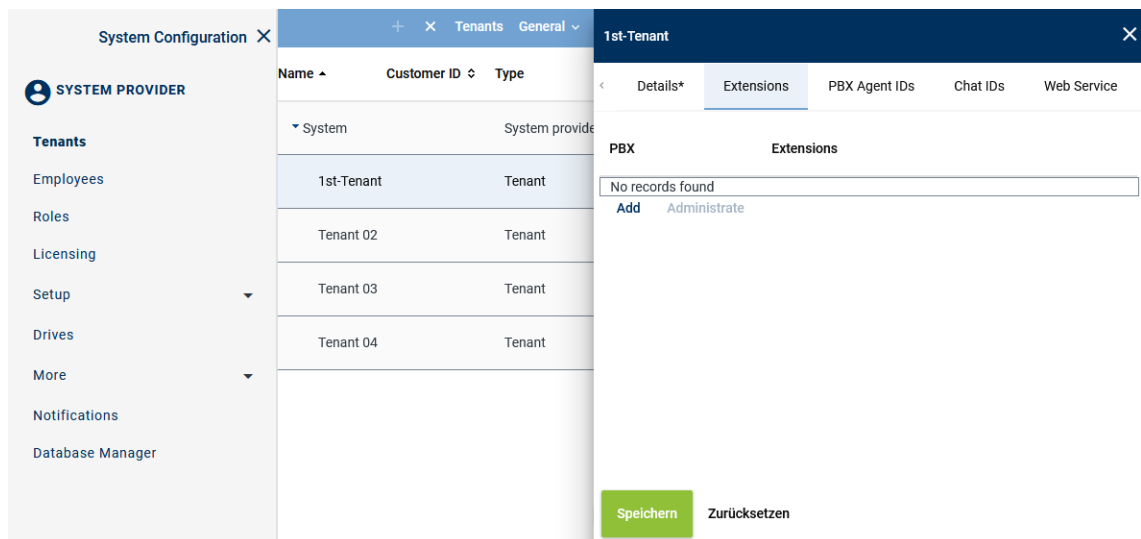


Fig. 51: Tenants - main view

5.2.2.1 Assign extensions

To be able to call the Neo system, you must assign an extension to the tenant.

1. In the main view, select the tenant that you would like to assign the extension to.
2. Click on the tab *Extensions*.
3. Click on the button *Add*.
 - ⇒ The following window appears:

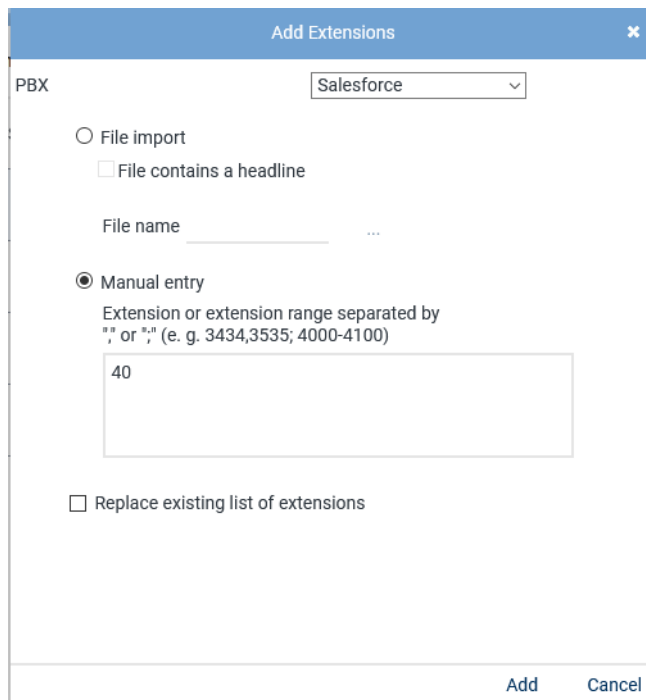


Fig. 52: Assign extensions to tenant

- From the drop-down list, select the PBX in which the extensions for this tenant have been configured.

File import

Select the option to import extensions from an existing file and add them to the table of extensions.

The following file formats are supported:

- ZIP
- TXT
- CSV

NOTICE! The maximum number of extensions in a file has been limited to 2000 for performance reasons. If more extensions are required, you can import several files.



File contains a headline

Activate this option so that this structured is recognized correctly when importing the file.

The file must not contain more than one column. If commas or other column separators are detected in the file, the file is considered invalid and an error message is displayed.

File name

To import the file, proceed as follows:

- Click on the button  behind the field *File name*.
- Click on the button *Choose File*.
- Select the respective file in the Explorer and click on the button *Open*.
- Click on the button  *Upload File*.

Manual entry

Select this option to enter extensions or extension ranges manually.

To import number ranges, you must enter the same number of digits for the beginning and the end of the range, e. g. 1-9, 10-99, 01-20, 001-200, 4000-5000. If the end of the range asks for several digits, you have to add zeros for the beginning of the range, e. g. 01-10, 010-100.

Enter country codes as number ranges as follows:
+4984496800-+4984496810

NOTICE! The number of digits must be equal. Add zeros in front of digits to level up possible incongruences.

NOTICE! Wildcards cannot be used!

Replace existing list of extensions

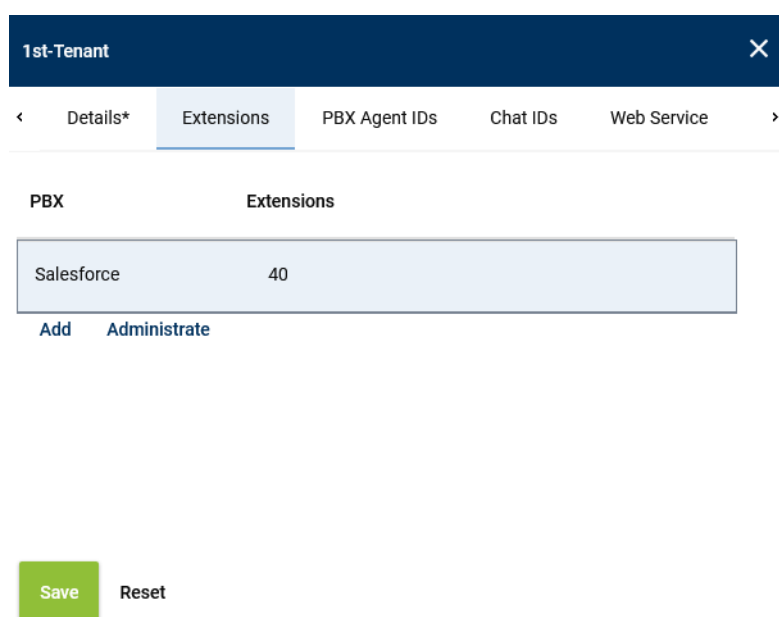
Activate the check box to replace the list of extensions.

☒ = Function has been activated; the entry replaces the extensions of the selected PBX.

☐ = Function has not been activated; the configured extensions of all PBXs are kept and the new extensions are added to the selected PBX.

5. Click on the button *Close*.

⇒ The configured extensions now appear in the detail view.



The screenshot shows a web interface for the '1st-Tenant' module. The 'Extensions' tab is selected, showing a table with two columns: 'PBX' and 'Extensions'. The table contains one entry: 'Salesforce' with the value '40'. Below the table are two buttons: 'Add' and 'Administrate'. At the bottom of the interface are two buttons: 'Save' (highlighted in green) and 'Reset'.


Fig. 53: Tenants module - tab Extensions, configured extensions

6. Click on the button *Save* in the detail view to save the entries.

5.2.2.2 Configure Web Service API

To enable tenants to use the Web Service to search for and replay recordings, you as system administrator must configure this option for each tenant.

1. Select the menu item *Tenants* in the navigation bar.
2. In the main view, select the account of the tenant for which you would like to adjust the settings.
3. Click on the tab *Web Service* to configure this option for the tenant.

 **SYSTEM PROVIDER**
Last login Nov 12, 2020 5:42:48 AM

1st-tenant
✕

Web Service
Details*
Extensions
PBX Agent IDs
Chat IDs

General Functions

☒ Checks the general Web Service functionality

Employees

Conversation

☒ Allows exporting conversations
☒ Allows searching for conversations via Web Service
☒ Allows exporting transcriptions
☐ Set deletion time for conversation
☐ Set deletion time for packages
☒ Update Conversation parameters

Tenant

Configuration

Conversations Export Server

Export server API-01
+
-

Save

Reset

Fig. 54: Web service functionalities for the tenant

4. Tick the check boxes of the functions which are supposed to be activated.
☒ = Function has been activated.
☐ = Function has not been activated.

Group field General Functions

In this group field, you can activate general function.

<i>Checks the general web service functionality</i>	Activate the check box, if you would like to allow checking the general web service functionality.
<i>Allows exporting licenses</i>	Activate the check box if you would like to allow exporting licenses.
<i>Allows importing license assignment</i>	Activate the check box if you would like to allow importing the license assignment.

Group field Conversation

In this group field, you can configure the functions for searching and exporting conversations via the Web Service.

<i>Allows exporting conversations</i>	Activate the check box if you would like to allow the tenant to export conversations via the Web Service. NOTICE! If you activate this function, you must enter an export server in the group field <i>Conversations Export Server</i>
---------------------------------------	--

<i>Allows searching for conversations via Web Service</i>	Activate the check box if you would like to allow the tenant to search conversations via the Web Service.
<i>Allows exporting transcriptions</i>	Activate the check box if you would like to allow the tenant to export transcriptions via the Web Service.
<i>Set deletion time for conversations</i>	This option is not available for this integration.
<i>Set deletion time for packages</i>	This option is not available for this integration.
<i>Update conversation parameters</i>	Activate the check box if you would like to allow the tenant to update the additional data for conversations via the Web Service. This applies for the additional data fields which have been configured in the PHONEapp module as tagging attributes and register fields.

Group field Conversations export server

In this group field, you can configure the export server on which the conversations which are supposed to be exported via the Web Service are stored.

Export server Click on the button **+** next to the field *Export server*.

Export Server

Name ▾

REC-04

REC-03

REC-02

REC-01

RC-02

RC-01

CTI-01

Rows per page 20 ▾

1 - 7 of 7

1-6

<<

>>

7-1

Add

Cancel

Fig. 55: Select export server

NOTICE! For export servers, the property *Replay* is mandatory. Therefore, this list only contains servers which have been configured as replay servers.

1. Select the server from the list from which the conversations are supposed to be exported.
2. Click on the button *Add*.
 - ⇒ The name of the export server appears in the detail view.



For information about the configuration of servers and recording architectures refer to the administration manual for system providers *Configuration servers and recording architectures*.

3. To save the settings, click on the button *Save*.
To discard the settings, click on the button *Reset*.

5.2.3 Configure Employees module



The following configuration has to be carried out as the administrator of the tenant.

In the Employees module, you must configure the following settings:

- *Configure extension*
 - *Assign individual function rights for additional data*
1. Select the menu item *Employees* in the navigation bar.
 2. Select the employee for whom you would like to carry out the configuration, in the example *Salesforce*.

5.2.3.1 Tab Agent Data

1. Click on the tab *Agent Data*.

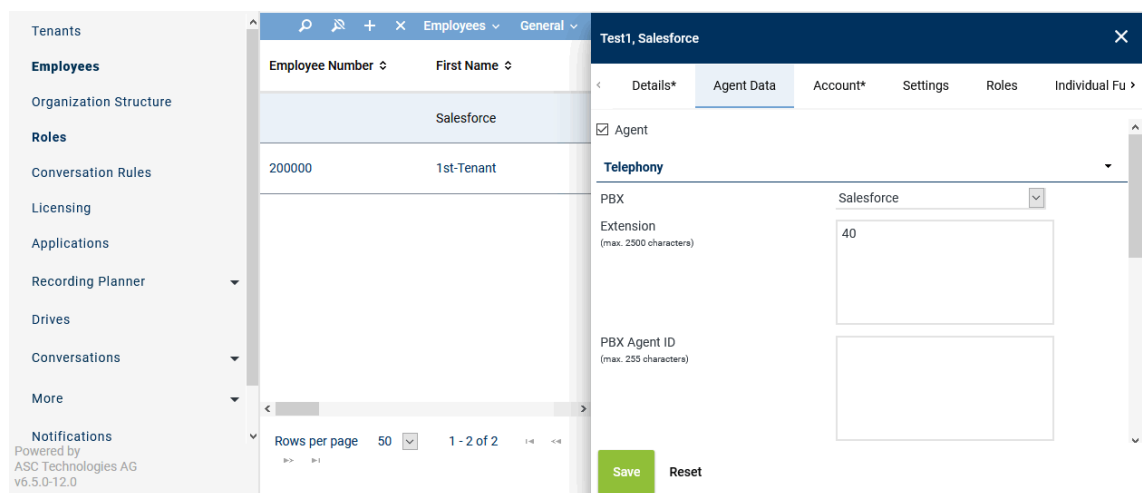


Fig. 56: Employees module - Assign extension

2. In the group field *Telephony*, select the PBX *Salesforce* in the drop-down list.
3. In the entry field *Extension*, enter the extension which is used for making phone calls.

5.2.3.2 Tab Individual Function Rights

1. Subsequently, click on the tab *Individual Function Rights*

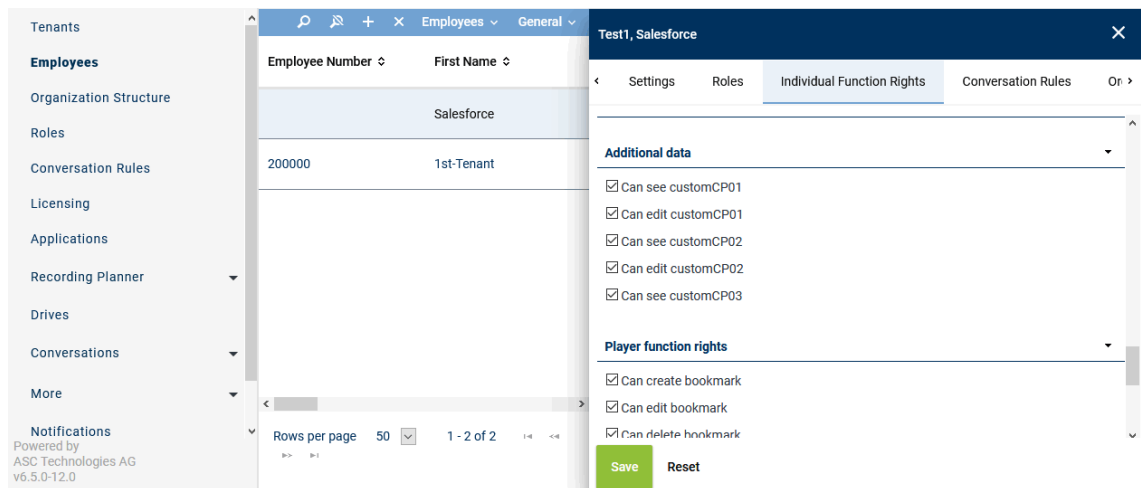


Fig. 57: Employees module - Individual Function Rights

Group field Additional Data

1. Scroll down to the group field *Additional Data*.
2. Activate all rights for using *additional data*.

Group field Player

1. Scroll down to the group field *Player*.
2. Activate all rights for using *additional data*.
3. Click on the button **Save** to apply the settings.

Player function rights

- ☐ Can create bookmark
- ☐ Can edit bookmark
- ☐ Can delete bookmark
- ☐ Can create mute section
- ☐ Can edit mute section
- ☐ Can delete mute section
- ☐ Can confirm keyword
- ☒ Can export voice recordings
- ☐ Can export screen and video recordings
- ☒ Can export conversation data
- ☐ Can set session category
- ☐ Can export chat recordings and text messages

Fig. 58: Employees module - function rights for the Player

4. Activate the following rights:

Can export voice recordings

Can export conversation data

5. Click on the button **Save** to apply the settings.

5.2.4 Configure Servers module

To use the Salesforce application, carry out the following configuration in the Servers module:

- Configure [API server](#)

- Activate recording control
- Configure replay server

5.2.4.1 Tab Usage

1. Click on the tab *Usage* to configure the intended purpose.

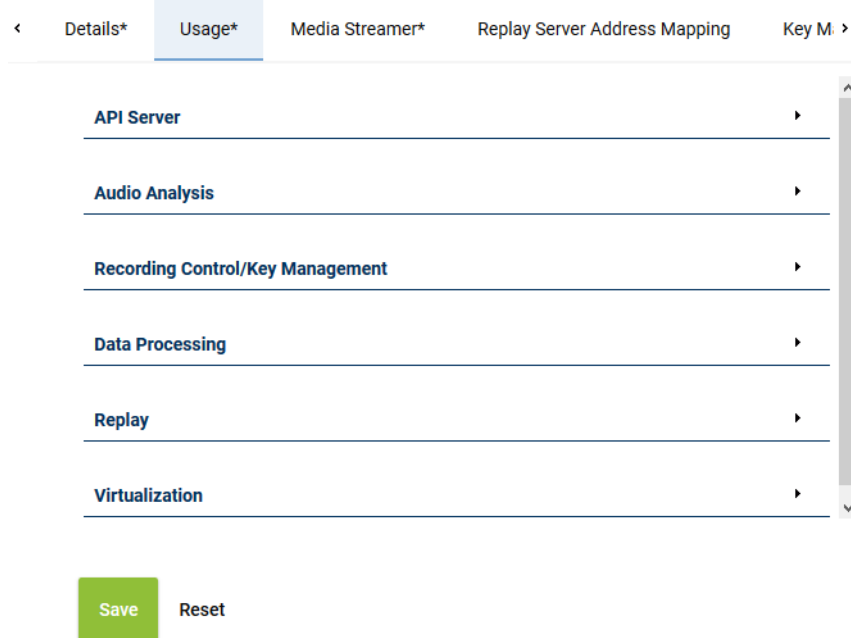


Fig. 59: Servers - tab usage

5.2.4.1.1 Group field API Server

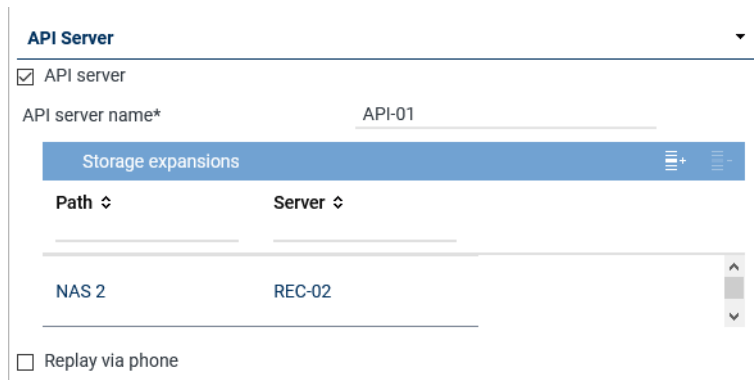


Fig. 60: Group field API Server

The ASC API Server is a service within the Neo software.

The ASC API Server does not only offer an interface for the internal modules; additionally, the client applications communicate with the Neo system by means of this interface, too, using defined commands.

Furthermore, the ASC API Server is responsible for replay by means of the web browser. Not until the ASC API Server has started, can the replay server be activated and the corresponding ASC API Server assigned for replay in the web applications.

Parameter	Value/Description
API server	Activate the check box to start the API server. <input checked="" type="checkbox"/> = Function has been activated. You must complete the entry field <i>API server</i> .

Parameter	Value/Description
	<input type="checkbox"/> = Function has not been activated.
<i>API server name</i>	Enter the name with which the server is supposed to be displayed in the system. The display name can be selected arbitrarily and serves as alias only. This API server is saved as export server in the Web Service.

5.2.4.1.2 Group field Recording Control/Key Management

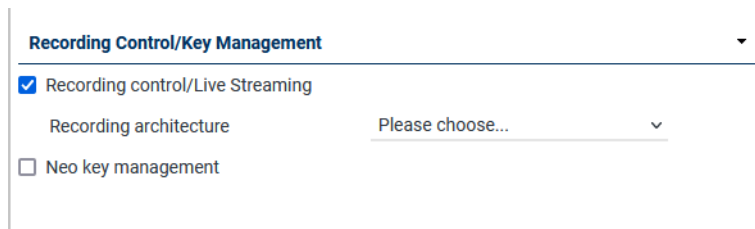


Fig. 61: Group field Recording Control/Key Management

Parameter	Value/Description
<i>Recording control/Monitoring</i>	Activate the check box to be able to use recording control by means of CLIENT <code>command</code> or by means of an API . The function is only available if a recording architecture has been configured and activated. <ul style="list-style-type: none"> Recording architecture From the drop-down list, select the recording architecture via which you would like to control the recording.

Tab. 4: Configure recording control/key management

5.2.4.1.3 Group field Replay

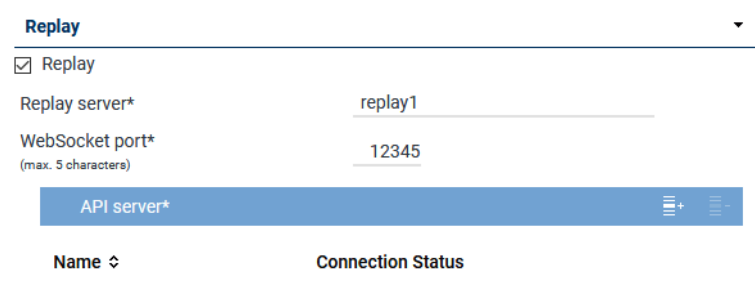




Fig. 62: Group field Replay

Parameter	Value/Description
<i>Replay</i>	Activate the check box <i>Replay</i> to be able to use the replay function on the players and phones. <ul style="list-style-type: none"> Replay server In the entry field <i>Replay server</i>, enter the name with which the server is supposed to be displayed as replay server in the system. <p>To be able to reach the server activated for replay from a public network and with configured port forwarding, too, you must configure the tab <i>Applet Address Mapping</i>. For more information about the configuration refer to the administration manual <i>Configuration servers and recording architectures</i>.</p>

Parameter	Value/Description
<i>Replay via phone</i>	<p>Activate this function if you would like to use the functions <i>Replay via phone</i> or <i>Last Call Repeat</i>.</p> <p><input checked="" type="checkbox"/> = Function has been activated. <input type="checkbox"/> = Function has not been activated.</p> <p>NOTICE! The function <i>Replay via phone</i> has been implemented in the following Neo components:</p> <ul style="list-style-type: none"> • Application POWERplay Web • Application POWERplay Pro • Application POWERplay Instant • Application POWERplay Web for Xpert • Replay module <p>To allow a client to use the function <i>Replay via phone</i>, you must go to the Employees module or the Phones module to assign this client an ID which enables the system to identify the phone.</p> <p>When activating the function <i>Replay via phone</i>, you must configure the tab <i>Media Streamer</i>. For more information refer to the administration manual <i>Configuration replay via phone</i>.</p> <p>NOTICE! The function is only available if at least one PBX has been configured in the system.</p>
List <i>Storage expansions</i>	<p>Here, you can add storage expansions for replay. If a recording which is supposed to be replayed cannot be found on the server, the search is continued on the storage expansions entered here. That way, recordings can be replayed even if they have not been transferred to the server.</p> <p>If the function <i>Replay</i> has been activated, you can enter the following settings:</p> <ul style="list-style-type: none"> • By clicking on the icon  (Add), you can add storage expansions. • By clicking on the icon  (Remove), you can remove storage expansions from the list. <p>If you use several recording servers in your system for which storage expansions have been configured, you can add any storage expansions of any recording server to any replay server.</p>

Tab. 5: Configure replay

5.2.5 Configure PBX module

In the PBX module, you must configure the following settings:

- *Configure PBX*
 - *Activate PHONEapp* configuration
1. Select the menu item *Setup > PBX* in the navigation bar.
 - ⇒ The following window appears:

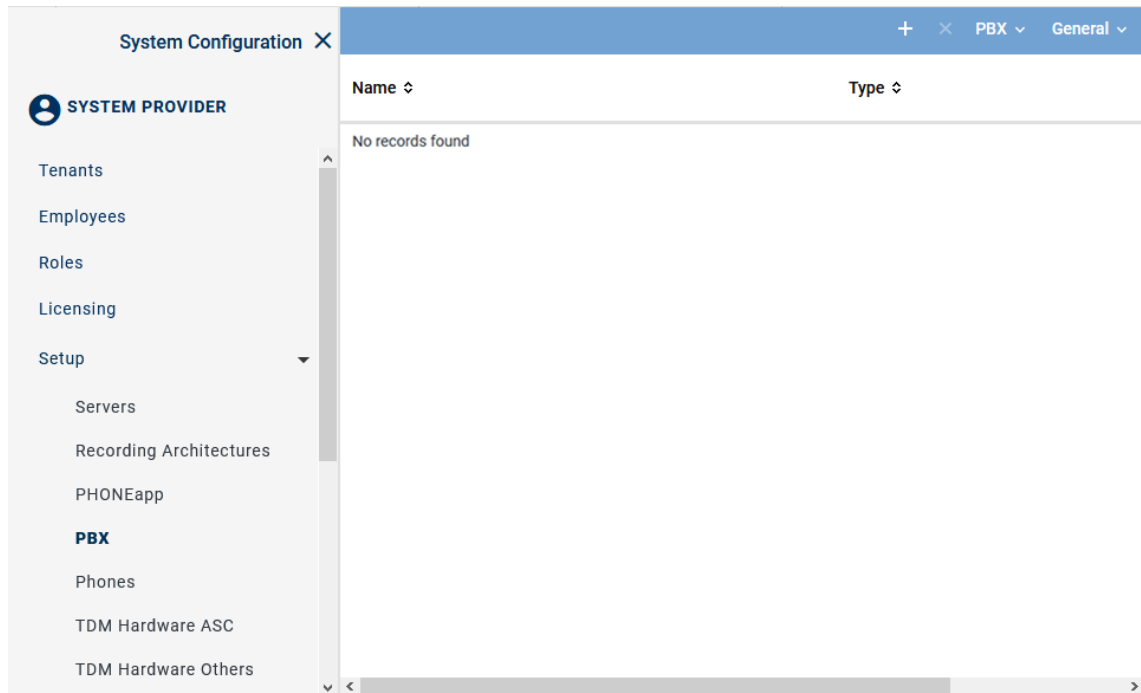



Fig. 63: PBX module - main view

5.2.5.1 Create new PBX

- Click on the icon  (*Create*) in the toolbar of the main view of the PBX module.
⇒ In the detail view, the tab *Details* appears.

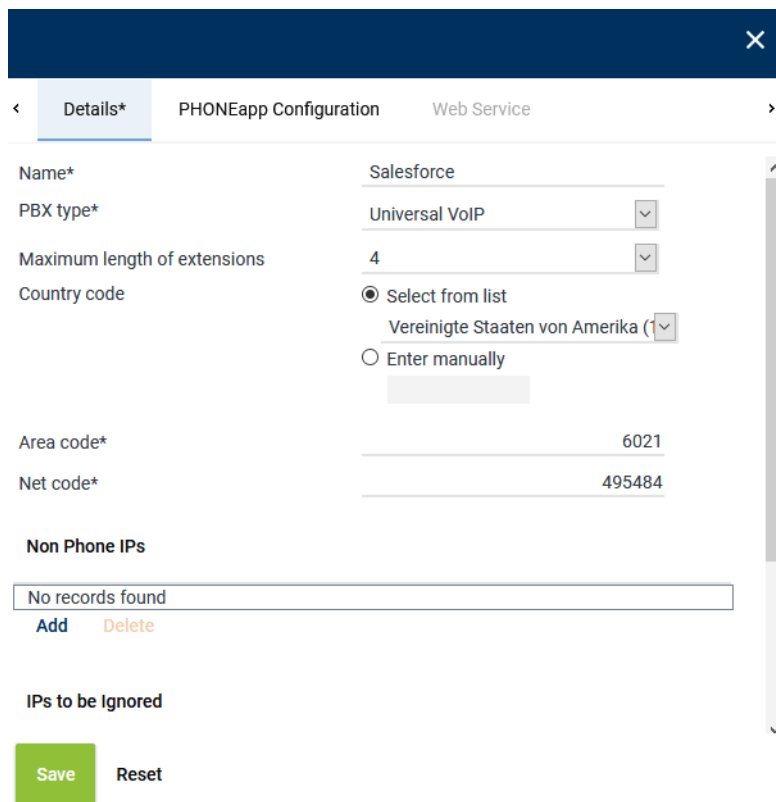


Fig. 64: Create new PBX - tab Details

- Enter the following parameters in the detail view:

Parameter	Value/Description
<i>Name</i>	The name can be selected arbitrarily; it serves as identifier for this PBX.
<i>PBX type</i>	Select the PBX type <i>Universal VoIP</i> from the drop-down list.
<i>Maximum length of the extensions</i>	Enter the number of digits of the extensions, e. g. 4.
<i>Country code</i>	Select the option to select the country code: <ul style="list-style-type: none"> • <i>Select from list</i> Select the country identifier with the corresponding country code from the drop-down list. • <i>Enter manually</i> If the corresponding country code is not available in the drop-down list, enter it manually displayed in 3 digits, e. g. for Sri Lanka 094.
<i>Area code</i>	Enter the area code without the preceding 0, e. g. 6021.
<i>Net code</i>	Enter the net code, e. g. 495484. Do not enter an extension here.

Tab. 6: Create PBX

- To save the settings, click on the button *Save*.
To discard the settings, click on the button *Reset*.

5.2.5.2 Tab PHONEapp Configuration

- Click on the tab *PHONEapp Configuration*.

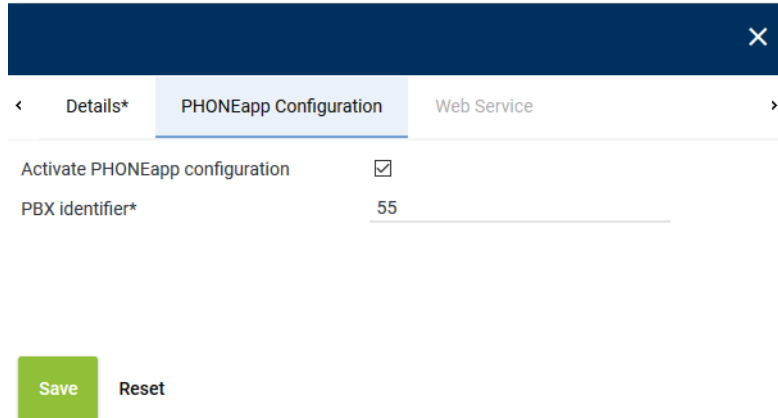


Fig. 65: Activate PHONEapp configuration

- Enter the following parameters:

<i>Activate PHONEapp configuration</i>	Tick the check box to activate the <i>PHONEapp</i> . Not until the <i>PHONEapp</i> has been activated here, can you carry out the following configuration in the <i>PHONEapp</i> module and in the <i>Phones</i> module.
<i>PBX identifier</i>	Enter the identifier of the PBX. The identifier allows the PBX to connect with the <i>PHONEapp</i> . This identifier is defined during the installation of the PBX. Use letters, numbers, and understrikes.

- To save the settings, click on the button *Save*.
To discard the settings, click on the button *Reset*.

5.2.6 Configure PHONEapp

In the PHONEapp module, you can configure the default settings for phone applications and configure phone types.

1. In the navigation bar, select the menu item *Setup* > *.PHONEapp*.

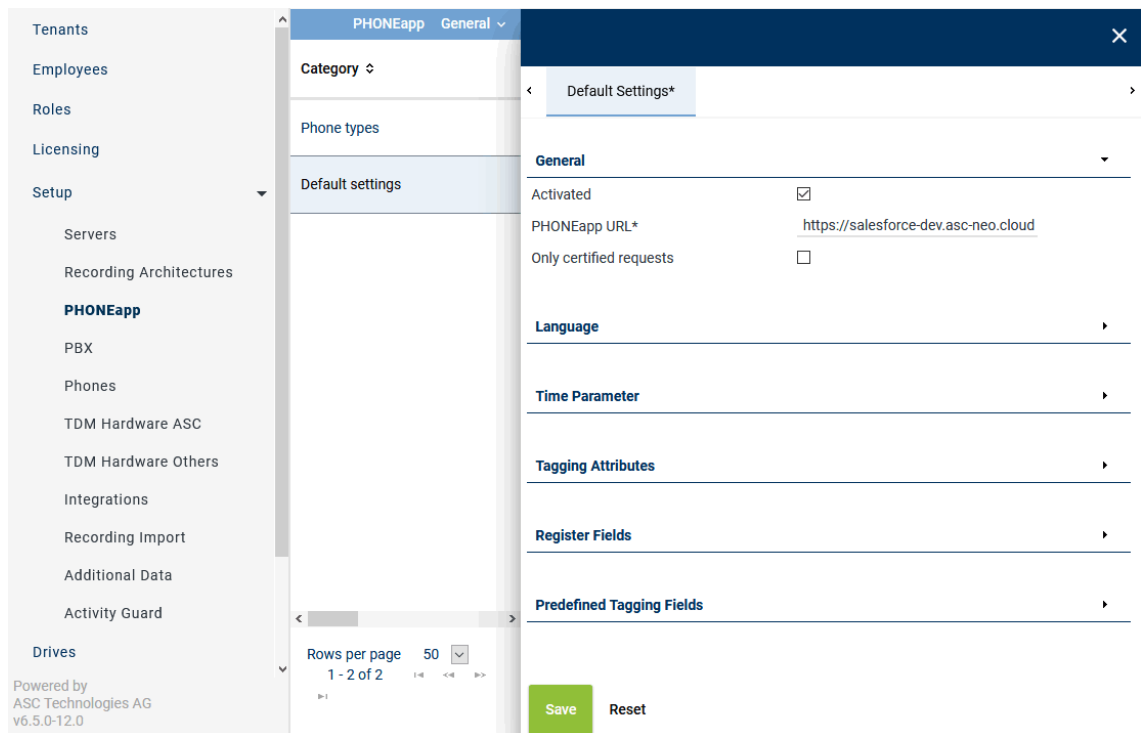


Fig. 66: PHONEapp module - Default settings

5.2.6.1 Configure phone types

In the category *Phone types*, you can view the properties of the supported end devices and add additional phone types.

The phone type for Salesforce is already available. You do not have to adjust any further settings.

5.2.6.2 Category Default Settings

In this category, you define the values for the general settings.

1. Select the category *Default settings* in the main view.
⇒ In the detail view, the different group fields are displayed.

5.2.6.2.1 Group field General

1. Enter the following parameters:

General	
Activated	<input checked="" type="checkbox"/>
PHONEapp URL*	https://salesforce-dev.asc-neo.cloud
Only certified requests	<input type="checkbox"/>

Fig. 67: PHONEapp module - Category Default settings - group field General

- **Activated** Activate the check box to be able to use external control.

- | | |
|----------------------------------|---|
| • <i>PHONEapp URL</i> | Enter the URL which allows calling up the PHONE <u>app</u> . Enter the URL in the Salesforce application. |
| • <i>Only certified requests</i> | This function is not available for Salesforce. |


5.2.6.2.2 Configure group field Tagging Attributes

Every request parameter must only be used once. The available fields may be assigned to different request parameters, though. As a field, any additional data marked as available in the Additional Data module in the application System Configuration can be used.

The configured tagging fields can be assigned and used in the Salesforce application.

Add and edit tagging attributes


1. In the detail view of *Setup > PHONEapp > Default Settings*, open the group field *Tagging Attributes*

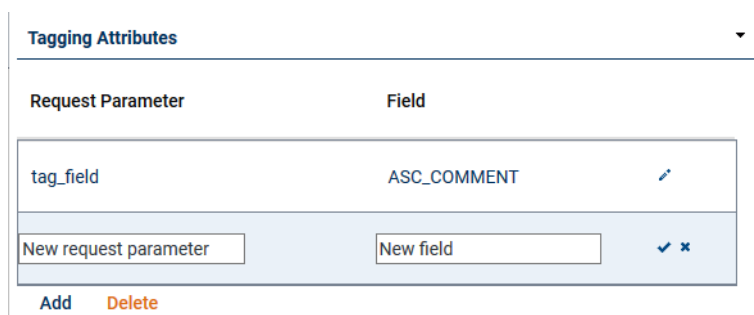


Request Parameter	Field
tag_field	ASC_COMMENT

Add Delete

Fig. 68: Group field Tagging Attributes



2. Click on the button *Add*.
⇒ A new entry is added.
3. To edit the entry, click on the icon .
- ⇒ The line is activated.



Request Parameter	Field
tag_field	ASC_COMMENT
New request parameter	New field

Add Delete

Fig. 69: Edit tagging attributes

4. Enter the respective parameters.
5. To save the changes, click on the icon . To discard the changes, click on the icon .
6. In the detail view, click on the button *Save* to apply the changes in the tab *Default Settings*.

Delete tagging attributes

1. Select the attribute to be deleted in the detail view.
2. Click on the button *Delete*.
3. Click on the button *Yes*.
⇒ The selected attribute is removed from the list.
4. Click on the button *Save* to apply the change in the tab *Default Settings*.


5.2.6.2.3 Configure group field Register Fields

Add and edit register fields

1. In the detail view of *Setup > PHONEapp > Default Settings*, open the group field *Register Fields*.



Register Fields		
Field	Recording Control Field	Active
Comment	ASC_COMMENT	✓
<div> Add Delete </div>		

Fig. 70: Group field Register Fields

2. Click on the button *Add*.
⇒ A new entry is added.
3. To edit the entry, click on the icon .
- ⇒ The line can be edited.

Register Fields		
Field	Recording Control Field	Active
Comment	ASC_COMMENT	✓
New field	New RC field	<input checked="" type="checkbox"/>
<div> Add Delete </div>		

Fig. 71: Edit register fields

4. Enter the respective parameters.
The name in the field *Field* can be selected arbitrarily. In the field *Recording Control Field*, all IDs listed under *Setup > Additional Data* can be used. In addition, the field name *ASC_COMMENT* can be used.
5. Activate or deactivate the register field via the check box.
6. To save the changes, click on the icon .
- To discard the changes, click on the icon .
7. In the detail view, click on the button *Save* to apply the changes in the tab *Default Settings*.

Delete register fields

1. In the detail view, select the attribute you would like to delete.
2. Click on the button *Delete*.
3. Click on the button *Yes*.
⇒ The selected attribute is removed from the list.
4. Click on the button *Save* to apply the change in the tab *Default Settings*.

5.2.6.2.4 Configure group field Predefined Tagging Fields

Within the Salesforce application, you can tag recorded conversations. This allows associating conversations with certain topics and later on filter or search for these conversations. Users can tag conversations during or after recording.

Activate comment field with free text

1. In the detail view of *Setup > PHONEapp > Default Settings*, open the group field *Predefined Tagging Fields*.
 2. Deactivate the check box *Activated*.
- ⇒ The comment with free text is displayed during the tagging process.

Activate tagging fields without free text

Here, you can configure predefined tagging fields which are supposed to be added to the conversations.

1. In the detail view of *Setup > PHONEapp > Default Settings*, open the group field *Predefined Tagging Fields*

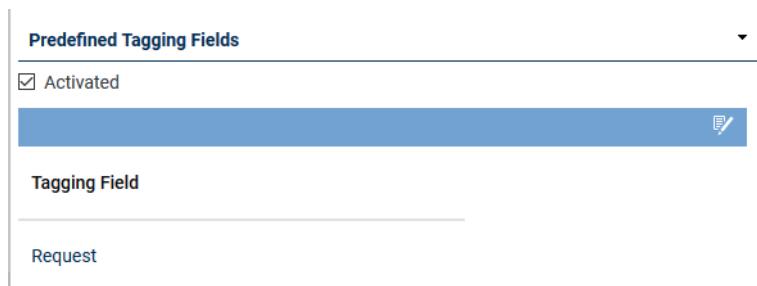

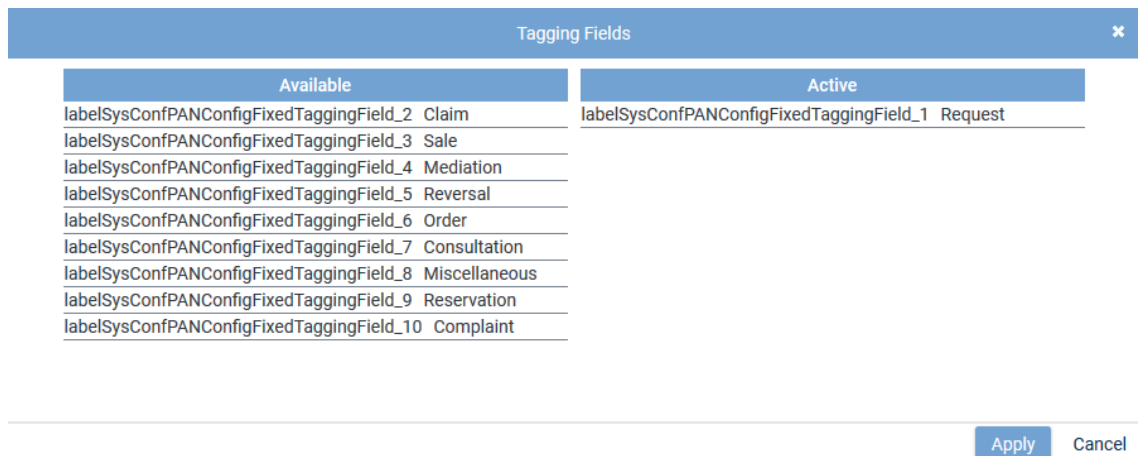



Fig. 72: Configure tagging fields

2. Activate the check box *Activated*.
 3. Click on the icon  (*Edit*).
- ⇒ The window *Tagging Fields* appears.



Available	Active
labelSysConfPANConfigFixedTaggingField_2 Claim	labelSysConfPANConfigFixedTaggingField_1 Request
labelSysConfPANConfigFixedTaggingField_3 Sale	
labelSysConfPANConfigFixedTaggingField_4 Mediation	
labelSysConfPANConfigFixedTaggingField_5 Reversal	
labelSysConfPANConfigFixedTaggingField_6 Order	
labelSysConfPANConfigFixedTaggingField_7 Consultation	
labelSysConfPANConfigFixedTaggingField_8 Miscellaneous	
labelSysConfPANConfigFixedTaggingField_9 Reservation	
labelSysConfPANConfigFixedTaggingField_10 Complaint	

Fig. 73: Edit tagging fields

4. To add a field, drag the selected field from the list of available fields on the left to the list *Active* in the window on the right and drop it there.
 5. To apply the changes, click on the button *Apply*.
To discard the changes, click on the button *Cancel* or on the icon .
 6. To activate the added fields, click on the check box *Activated*.
 7. In the detail view, click on the button *Save* to apply the changes in the tab *Default Settings*.
- The following fields are available by default in the list *Available*:

<i>Request</i>	Use this attribute to tag conversations revolving around a request.
<i>Claim</i>	Use this attribute to tag conversations revolving around a claim.
<i>Mediation</i>	Use this attribute to tag conversations revolving around a mediation.










<i>Order</i>	Use this attribute to tag conversations revolving around an order.
<i>Consultation</i>	Use this attribute to tag conversations revolving around a consultation.
<i>Reservation</i>	Use this attribute to tag conversations revolving around a reservation.
<i>Complaint</i>	Use this attribute to tag conversations revolving around a complaint.
<i>Sale</i>	Use this attribute to tag conversations revolving around a sale.
<i>Reversal</i>	Use this attribute to tag conversations revolving around a reversal.



The tagging fields are displayed along with the corresponding resource string. You can adjust tagging fields in the Resource Editor module of the application System Configuration. See administration manual *System Configuration - Resource Editor*.

Changes in the Resource Editor module only affect future recordings. Existing taggings are not changed.

The following functions are available in the window *Tagging Fields*:

	<i>Add</i>	Adds the selected column.
	<i>Add all</i>	Adds all selected columns.
	<i>Remove</i>	Removes the selected column.
	<i>Remove all</i>	Removes all selected columns.
	<i>Up</i>	Moves the selected column one row up.
	<i>First position</i>	Places the selected column first.
	<i>Down</i>	Moves the selected column one row down.
	<i>Last position</i>	Places the selected column last.
Apply		Saves all changes and closes the window <i>Tagging Fields</i> .
		Closes the window <i>Tagging Fields</i> without applying the changes.
		Closes the window <i>Tagging Fields</i> without applying the changes.



You can change the position of a tagging field by moving the selected field to the required position while holding the left mouse button down, too.

5.2.6.2.5 Save configuration

- To save the settings, click on the button *Save*.
To discard the settings, click on the button *Reset*.

5.2.7 Configure phones

The phones are configured in the menu item *Phones* of the Setup module of the application System Configuration.

- Select the menu item *Setup > Phones* in the navigation bar.

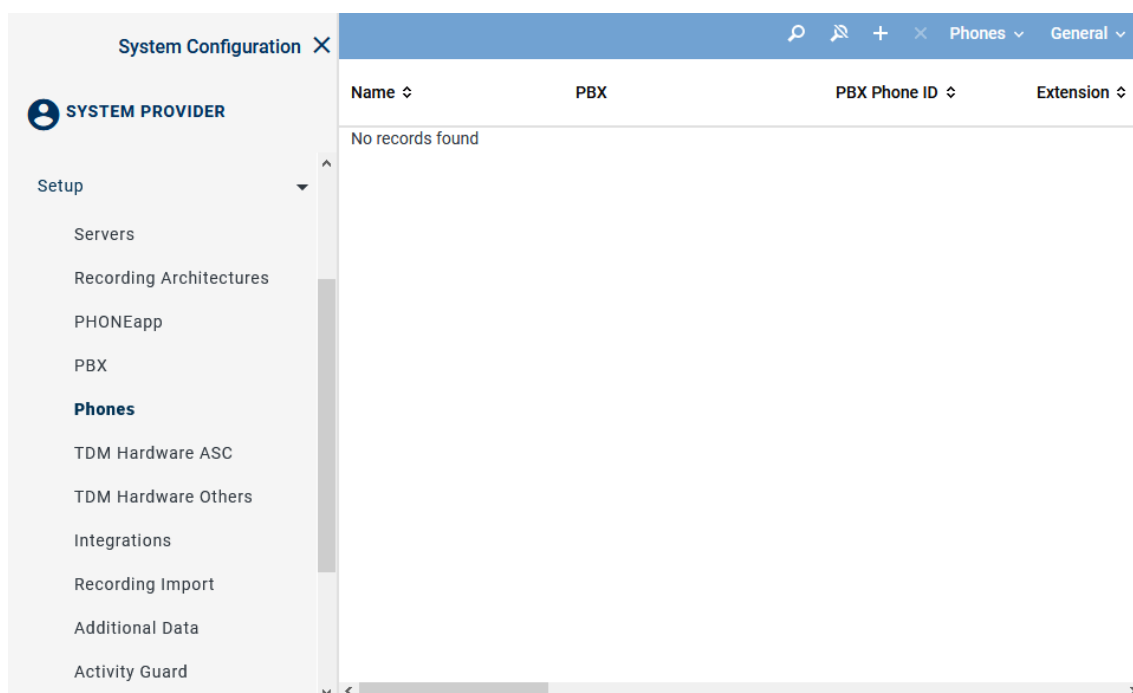



Fig. 74: Setup - Phones

2. To add a new phone, click on the icon  (Create).
3. Select the option *IP Phone*.
4. Click on the tab *Details* in the detail view.



Configure the end device type that you would like to use for the Salesforce application.

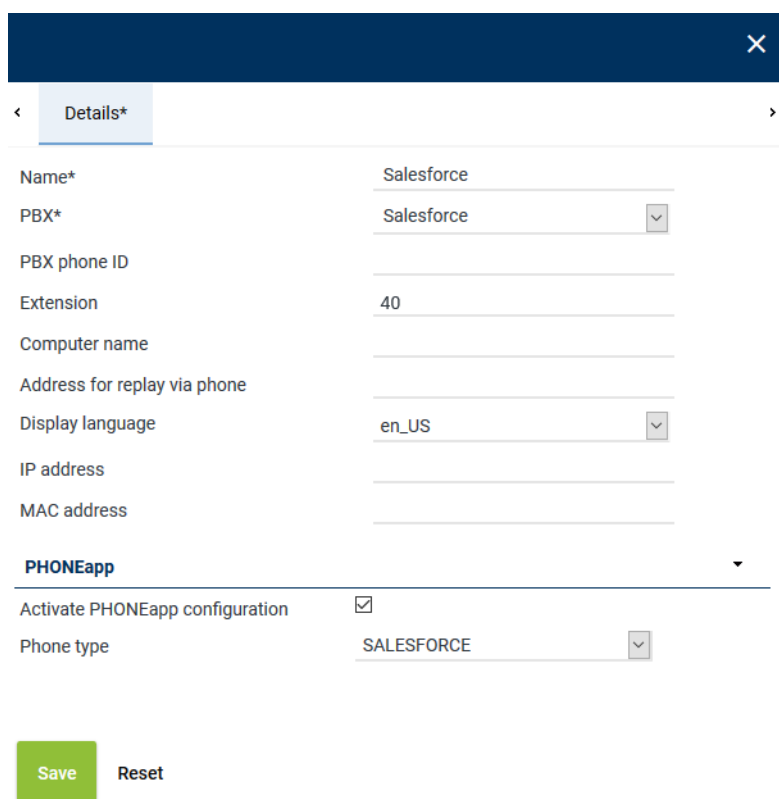


Fig. 75: Tab Details (example)

Enter the following parameters:

<i>Name</i>	Enter the name of the phone.
<i>PBX</i>	Select your already configured PBX.
<i>PBX phone ID</i>	Enter the ID of the end device of the PBX. This is a mandatory field when using Shared Lines.
<i>Extension</i>	Enter the extension of the end device, in the example 40.
<i>Computer name</i>	Enter the name of the computer if you would like to use <i>Free Seating</i> .
<i>Address for replay via phone</i>	This function is of no relevance for Salesforce.
<i>Display language</i>	Select the language that is supposed to be used on the display of the end device.
<i>IP address</i>	Enter the IP address of the end device.
<i>MAC address</i>	Enter the MAC address of the end device if the IP address is not available.
<i>Activate PHONEapp configuration</i>	Tick the check box to activate the PHONE <u>app</u> on the end device. This option is only available if the PHONE <u>app</u> has been activated in the PBX module.
<i>Phone type</i>	Select the phone type <i>SALESFORCE</i> . The phone type is only available if you have installed the license PHONE <u>app</u> for Salesforce.

5. In the detail view, click on the button *Save* to apply the changes in the tab *Details*.

⇒ The recently created phone is displayed in the main view.

5.2.8 Configure additional data

In the Additional Data module, you can configure the additional data which can be used by the Salesforce application.

In order to have the fields displayed in the integration, you must activate them in the Additional Data module as available and editable.

1. Select the menu item *Setup > Additional Data* in the navigation bar.

System Configuration X		Additional Data	Additional Data	General v
SYSTEM PROVIDER		ID ↕	Displayed Name ↕	Available ↕
Setup		customCP01	customCP01	✗
Servers		customCP02	customCP02	✗
Recording Architectures		customCP03	customCP03	✗
PHONEapp		customCP04	customCP04	✗
PBX		customCP05	customCP05	✗
Phones		customCP06	customCP06	✗
TDM Hardware ASC		customCP07	customCP07	✗
TDM Hardware Others		customCP08	customCP08	✗
Integrations				
Recording Import				
Additional Data				
Activity Guard				

Fig. 76: Additional Data module - main view

- Select the data set you would like to configure.
 - ⇒ In the detail view, the information that can be configured appears.

customCP01

Details

ID

customCP01

Description

Change Display Name

Availability

Save

Reset

Fig. 77: Configure additional data

- Open the group field Availability

Group field Availability

Availability	
Available	<input checked="" type="checkbox"/>
Editable	<input checked="" type="checkbox"/>
External recording control	<input checked="" type="checkbox"/>

Fig. 78: Group field Availability

<i>Available</i>	Tick the check box to make the data field available for the entire system.
<i>Editable</i>	Tick the check box to make the data field editable for the search and replay applications subsequently.
<i>External recording control</i>	Tick the check box to use the data field for external recording control.

1. Click on the button **Save** to save the settings.

5.2.9

Configure Recording Planner



The following configuration has to be carried out as the administrator of the tenant.

In the Recording Planner module of the application System Configuration, you can configure recording plans for automated recording or external recording control.

1. Log in to the application System Configuration as system administrator of the tenant (*1st-tenant-admin*).
2. Select the menu item *Recording Planner > Compliance*.
 - ⇒ The main view appears.

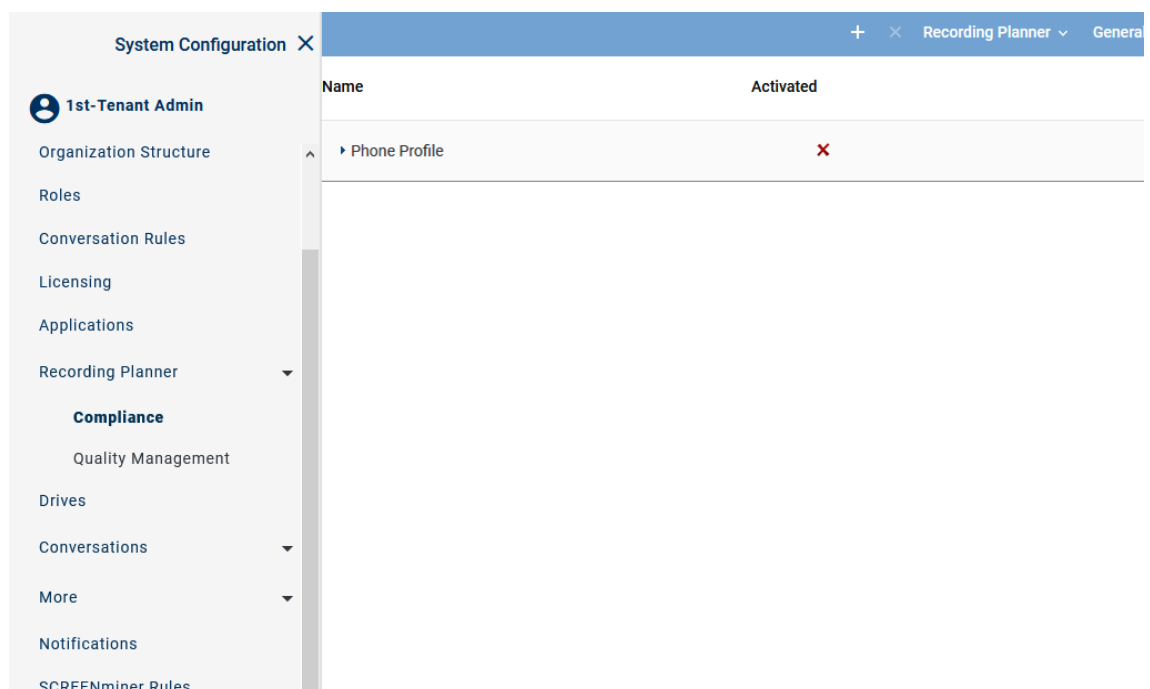



Fig. 79: Recording Planner - main view

- By default, one phone profile has been preconfigured and activated. Delete or deactivate this profile so that it does not interfere with the recording of the new profile.
- In the main view, click on the icon  (*Create/Duplicate profile*) to create a new profile.

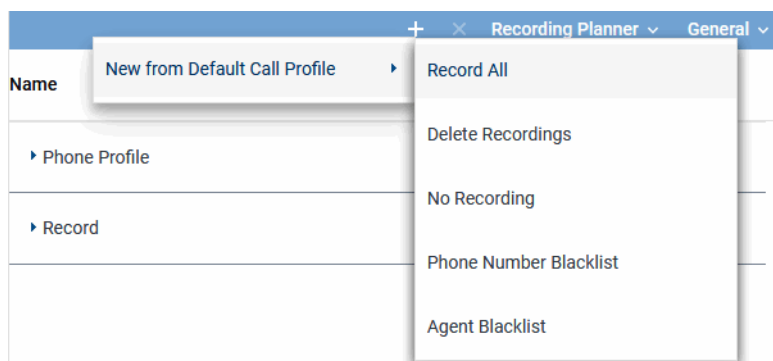


Fig. 80: Create new profile

- Select the option *New from Default Call Profile > Record All*. Then, you can continue to configure the action node allowing external recording control.

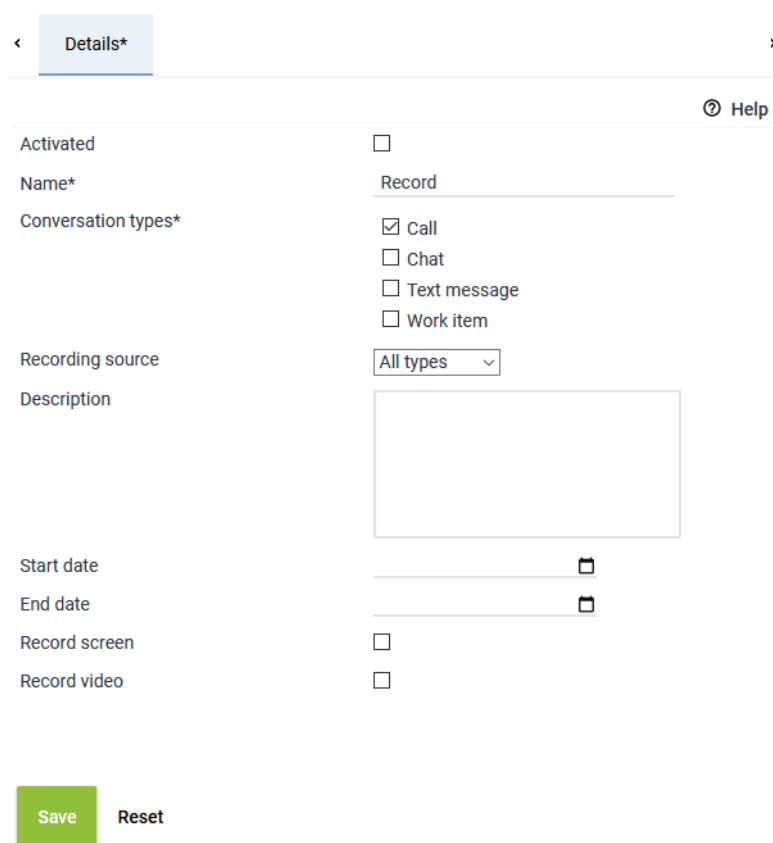


Fig. 81: Configure parameters for the recording profile

- Enter the following parameters:

<i>Activated</i>	Do not activate the check box before you have configured the action node. The profile can only be edited as long as it is inactive.
<i>Name</i>	Enter a name for the recording profile, in the example <i>Record</i> .
<i>Conversation types</i>	Select the option <i>Calls</i> . NOTICE! Other conversation types are not supported in this integration.
<i>Recording source</i>	From the drop-down list, select the entry <i>All types</i> .

7. Click on the button *Save* to save the settings.
⇒ The profile appears in the main view.
8. Click on the arrow in the line of the profile to open the group field.
⇒ A default action node appears below the profile.

When creating a new profile, the predefined action node *Default* appears. This action node cannot be changed. To configure customized recording, you must create a new action node and replace the default action node with the new one.

9. Select the action node and click on the menu item *Recording Planner > Create/Edit Action Node Configuration*.
10. Select the menu item *New > Record*.

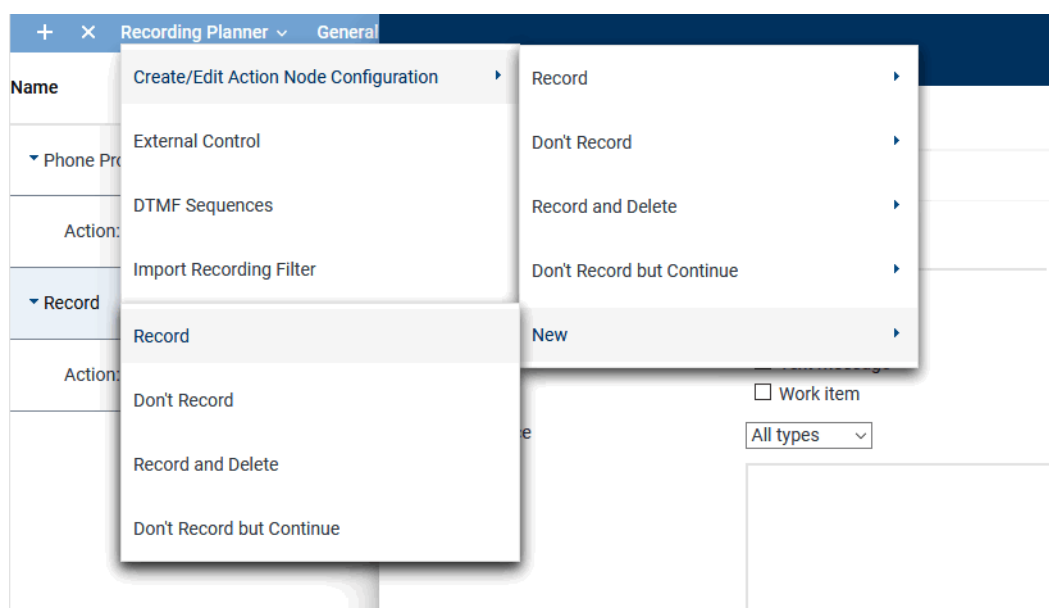


Fig. 82: Create action nodes

11. In the detail view, enter the parameters which enable external recording control.

Details*

Type

Record

Name*

Salesforce

Recording Suppression

Delete Recordings

Delete

☐ Never

☒ After

0 Year(s)

9 Month(s)

0 Day(s)

0 Hour(s)

0 Minute(s)

Wrap-up Time

External Recording Control

Allowed clients

☒ API

☒ CLIENTcommand

☐ DTMF sequences

☐ Function keys

☒ PHONEapp

☐ SCREENrec

☐ WEBcommand

Allowed Actions

Start recordings

☒

Stop recordings

☒

Stopped recordings

☒ Keep, if not externally deleted

☐ Delete, if not externally kept

Keep recordings

☒

Delete recordings

☒

Suppress recordings

☒

Unsuppress recordings

☒

Save

Cancel

Fig. 83: Enter parameters for action node

Type	The type of the action node is displayed depending on the selected background, in the example <i>Record</i> .
Name	Enter a name for the action node, in the example <i>Salesforce</i> .

Group field Delete Recordings

Delete Recordings	<p>This option applies for the automatic deletion of saved recordings. You can configure the time until the recordings are deleted permanently. Select the required option.</p> <div><input checked="" type="radio"/> After</div>
-------------------	---

NOTICE! When selecting this option, you must define a time when recordings are deleted. If all parameters are set to 0, the recordings are deleted immediately.

Enter the period of time after which the saved recordings will be deleted in general, e. g. *9 months*.

Group field External Recording Control

Allowed clients:

Activate the options:

- *API*
- *CLIENTcommand*
- *PHONEapp*

Group field Allowed Actions

1. All recording options are supported; select the respective options.

<i>Start recordings</i>	Allows manually starting the recording for all clients activated under <i>External Recording Control</i> .
<i>Stop recordings</i>	Allows manually stopping the recording for all clients activated under <i>External Recording Control</i> .
<i>Stopped recordings</i>	Select the option that is meant to be executed if no external decision is made regarding stopped recordings. <input checked="" type="radio"/> <i>Keep, if not externally deleted</i>
<i>Keep recordings</i>	Allows keeping recording for all clients activated under <i>External Recording Control</i> . Deletion can be prevented by means of external recording control by making the explicit decision to keep the recording.
<i>Delete recordings</i>	With external recording control, it is always the last decision that counts: If agents send a keep command by means of external recording control, they can change their decision by sending a delete command.
<i>Suppress recordings</i>	Allows suppressing the audio recording of a running conversations without having to stop it.
<i>Unsuppress recordings</i>	Allows undoing the suppression of the audio recording of a running conversations without having to stop it.

2. Click on the button *Save*.
⇒ The action node *Default* can now be replaced with the created new action node *Salesforce*.
3. To do so, select the menu item *Recording Planner > Replace with Action > Record > Salesforce* in the toolbar.

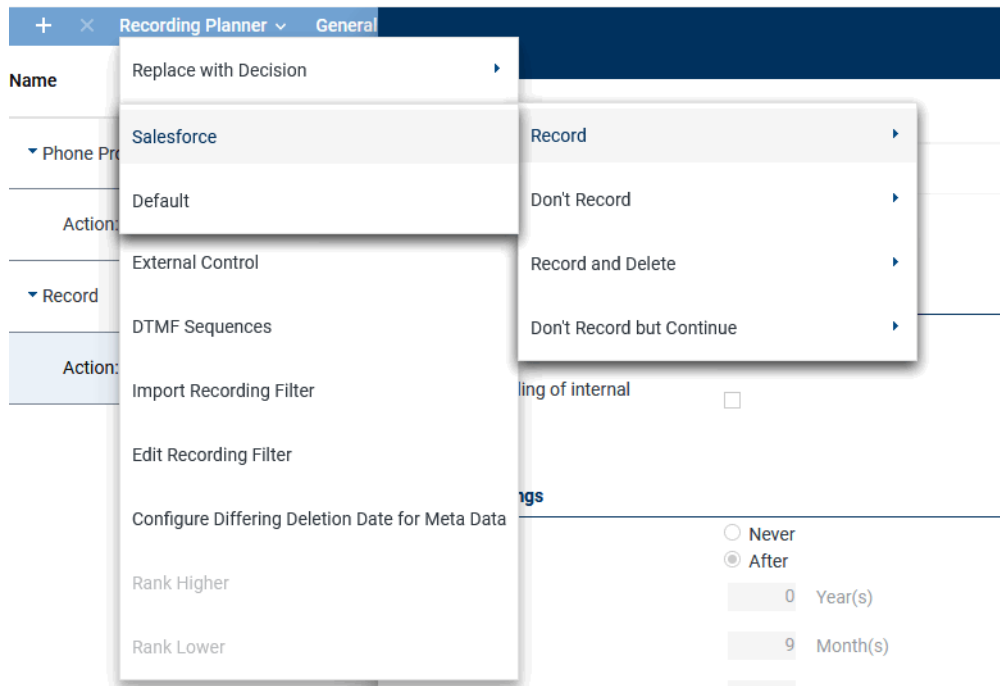


Fig. 84: Replace action node

In the main view, the action node *Record - Salesforce* appears.

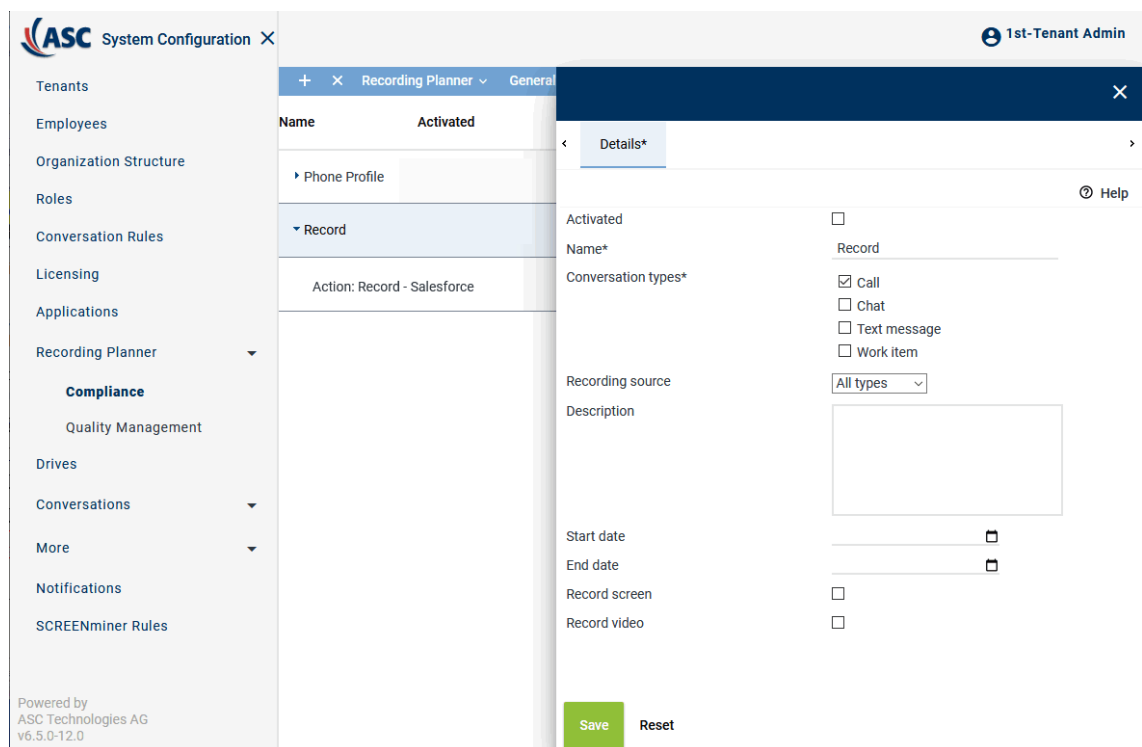


Fig. 85: Action node - Record Salesforce

4. Select the recording profile *Record* in the main view.
5. In the detail view, activate the check box *Activated* so that the profile is used for recording.

+ × Recording Planner ▾ General ▾	
Name	Activated
▾ Record	✓
Action: Record - Salesforce	

Fig. 86: Activate recording profile



For information about the Recording Planner module refer to the administration manual for tenants *Recording Planner*.

5.2.10

Configure Applications module

To enable the recording server to communicate with the Salesforce application, you must configure the connection data in the Applications module.



The following configuration has to be carried out as the administrator of the tenant.

1. Log in to the application System Configuration as system administrator of the tenant (*1st-tenant-admin*).
2. Select the menu item *Applications* in the navigation bar.
 - ⇒ The main view appears.

System Configuration × Settings General	
1st-Tenant Admin Tenants Employees Organization Structure Roles Conversation Rules Licensing Applications Recording Planner ▾ Drives Conversations ▾ More ▾ Notifications SCREENminer Rules	Name ↕ Salesforce WEBcommand Teleopti Info Audio Analysis POWERplay Web for Xpert CLIENTcommand POWERplay Instant POWERplay Go

Fig. 87: Applications module - main view

3. In the main view, select the entry *Salesforce*.
4. Enter the connection data in the tab *General Settings*.

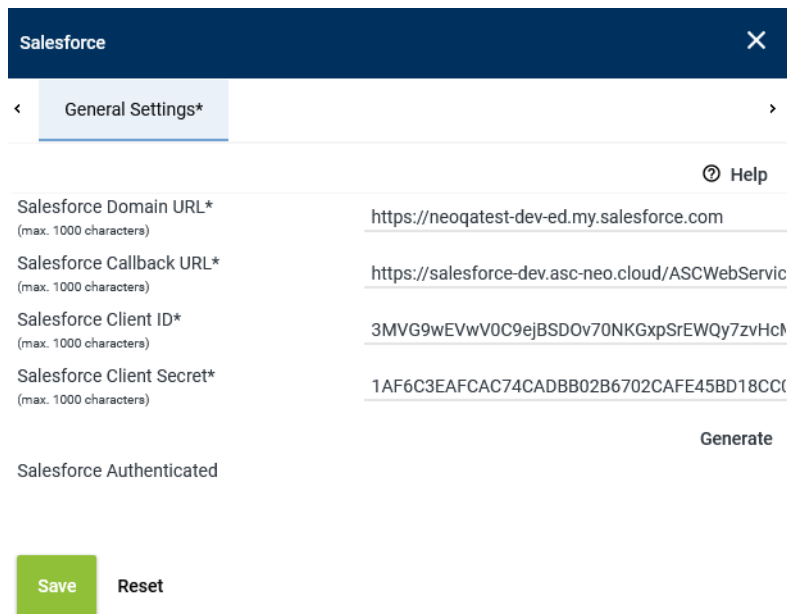


Fig. 88: Configure general settings for the connection to the Salesforce app

The two components communicate via the two URLs.

Salesforce Domain URL	Enter the URL to the Salesforce application. The URL contains the name of the tenant to authenticate in the Salesforce app. The login request is sent via this URL. e. g. https://neoqatest-dev-ed.my.salesforce.com
Salesforce Callback URL	Enter the URL of the Web Service of the recording server with the addition <code>ASCWebService/_sfcallback</code> . The Salesforce app uses this URL for its response. e. g. https://salesforce-dev.asc-neo.cloud/ASCWebService/_sfcallback
Salesforce Client ID (max. 1000 characters)	The parameter <i>Client ID</i> serves to guarantee communication with the Salesforce instance.
Salesforce Client Secret (max. 1000 characters)	The parameter <i>Client Secret</i> serves to guarantee communication with the Salesforce instance.

The values *Client ID* and *Client Secret* can be found in the Salesforce application.

- Change to the path *Setup > Apps > App Manager > Connected App* that you have created previously.
- Open the drop-down list.
- Click on the menu item *Object Display*.
⇒ You now see the following entries:

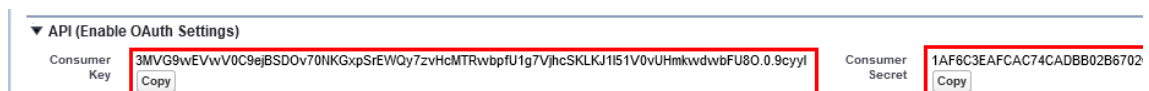


Fig. 89: Key and ID of the connected app

- `consumerkey = clientId`
- `consumer secret = client secret`


By clicking on the button *Copy*, you can copy the values into a buffer and apply them in Neo.

- Enter the required data.

9. Click on the button *Save* to save the entries.
 - ⇒ The button *Generate* becomes active.
10. Click on the button *Generate*.
 - ⇒ The window to enter the login data for the Salesforce application opens. For the following configuration you must be the system administrator of the Salesforce Org. By logging in, you authenticate to assign the application the required permissions.
 - ⇒ The recording server sends an authentication request with the login data to the Salesforce application. The Salesforce application responds via the configured callback URL.

5.3 Complete configuration of Salesforce application

Once the Neo software has been configured, you can complete the User Management in Salesforce.

1. Click on the icon for all applications  in the taskbar at the top left.
2. The window *App Launcher* opens.

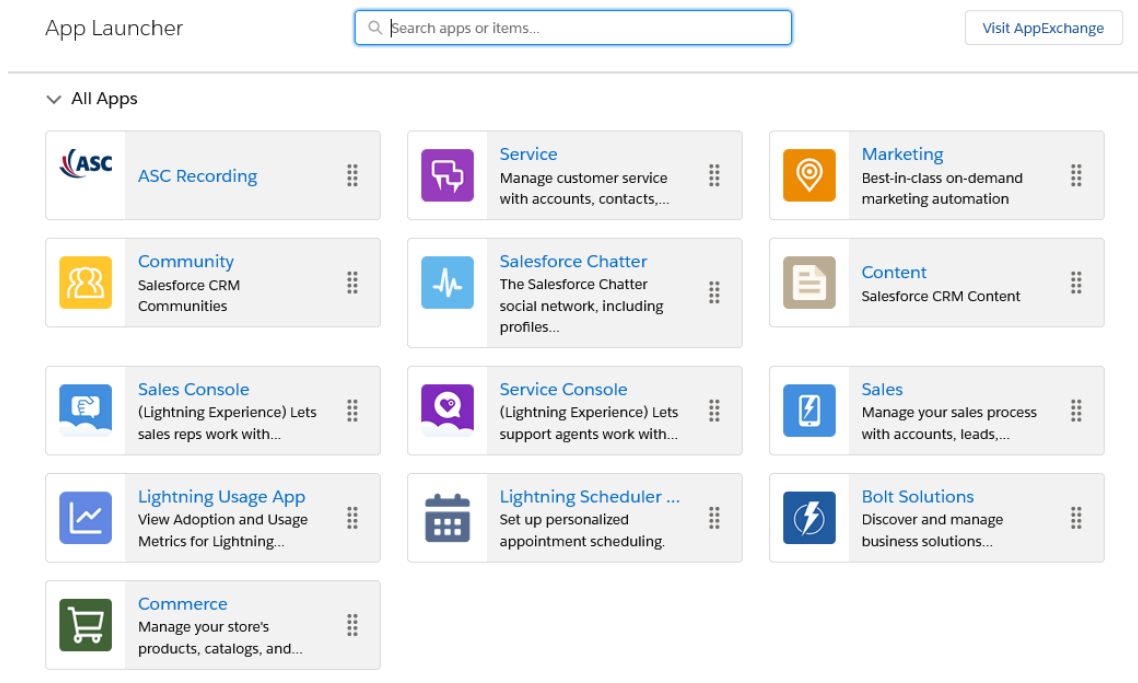


Fig. 90: App Launcher

3. Click on the button *ASC Recording*.

5.3.1 Configure ASC User Management



This setting must be configured for every user who has been assigned an extension in the Neo application and who is supposed to deploy ASC Recording in the Salesforce application. In case of missing information, contact your administrator.

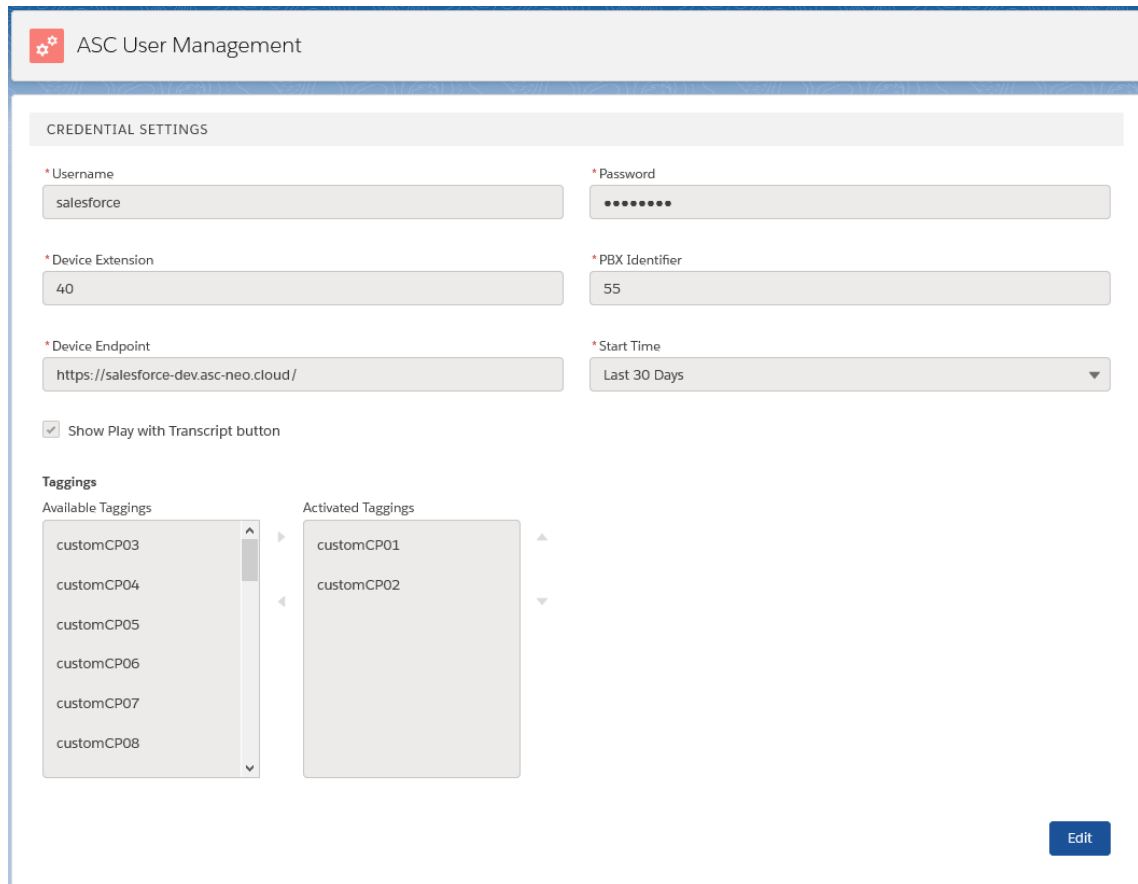


Fig. 91: Salesforce application - Configure ASC User Management

1. Click on the button *Edit* to edit the parameters.

Credential Settings

1. Enter the following parameters:

Username	Enter the user name of the tenant for which the Salesforce integration has been set up on the recording server.
Password	Enter the password to access the ASC recording server.
Device Extension	Enter the extension of the recording server, in the example 40.
PBX Identifier	Enter the PBX Identifier which has been configured for the recording server in the ASC application System Configuration in the PHONEapp module, in the example 55, see chapter "Tab PHONEapp Configuration", p. 46.
Device Endpoint	Enter the URL that is used to call up the application. You can use the IP address or an DNS name, in the example <code>https://salesforce-dev.asc-neo.cloud</code> , see also chapter "Tab PHONEapp Configuration", p. 46.
Start Time	Enter the period of time from which you would like to display conversations from the application.



The Neo system requires a signed [SSL](#) certificate from a root certifying authority; otherwise it will not be possible to establish a connection between Salesforce and the recording server. The operator of the Neo must have the certificate issued for the respective DNS name and install it on the recording server with the certificate import tool. The DNS name for the Neo system for which the certificate has been issued must be used as an end device in the Salesforce configuration.

Play with Transcript

<input checked="" type="checkbox"/>	Show Play with Transcript	When activating this check box, the button for transcription is displayed in your account in the tab <i>ASC Recordings</i> . This allows replaying the audio and displaying the content of a recording as text.
-------------------------------------	---------------------------	---

Recordings

NAME	PLAY	TAGGINGS	TOPICS
Rec-000000054	<div><div><div></div><div></div><div></div></div><div>00:00<div></div>00:08</div></div>	Customer number: anotherTaggingTest	<div><div>Play with Transcript</div><div></div></div>
Rec-000000049	<div><div><div></div><div></div><div></div></div><div>00:00<div></div>00:30</div></div>	Customer number: customerNumber customCP02: cp02	<div><div>Play with Transcript</div><div></div></div>
<div><div><div>< Previous</div><div>Next ></div></div></div>			

Fig. 92: Transcription button in the tab Accounts - ASC Recordings

Configure taggings

1. In the list *Available Taggings*, select the required fields and add them to the list *Activated Taggings* by clicking on the arrow keys.
2. Click on the button *Save* to save the configuration.



The displayed available customCP fields depend on the assigned authorization set. If you require additional customCP fields, you must add the authorizations for the corresponding customCP fields in the authorization set of the respective user.

6 Troubleshooting

When opening the Recording window by means of control, the following error message appears:

- "The Certificate used by the Endpoint is invalid"

Verify the content of the certificate file and make sure that all certificates (Certificate Chaining) have been saved in it. This can be verified here:

<https://www.ssllabs.com/ssltest/>

Run a test for neo and search for "chain issues" in the results. "Incomplete" indicates missing certificates.

TopicsForObjects

If topics have been activated and users change a value, the administrator is notified that a new picklist value has been added and ask to consolidate it.

1. To consolidate, change to the following path:
Setup > Object Manager > Recording > Fields & Relationships > Topics
At the bottom, inactive values are displayed.
2. Delete or enable the respective values.

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Glossary

API

Application Programming Interface

API server

Server on which the API service runs. (API=Application Programming Interface)

PBX

Private Branch Exchange

SSL

Secure Socket Layer

URL

Uniform resource locator. Identifies and locates a resource (e. g. a website) about the used access method (e. g. the used network protocol as HTTP or FTP) and the location of the resource in the computer network. (Source: Wikipedia 20th November 2013)