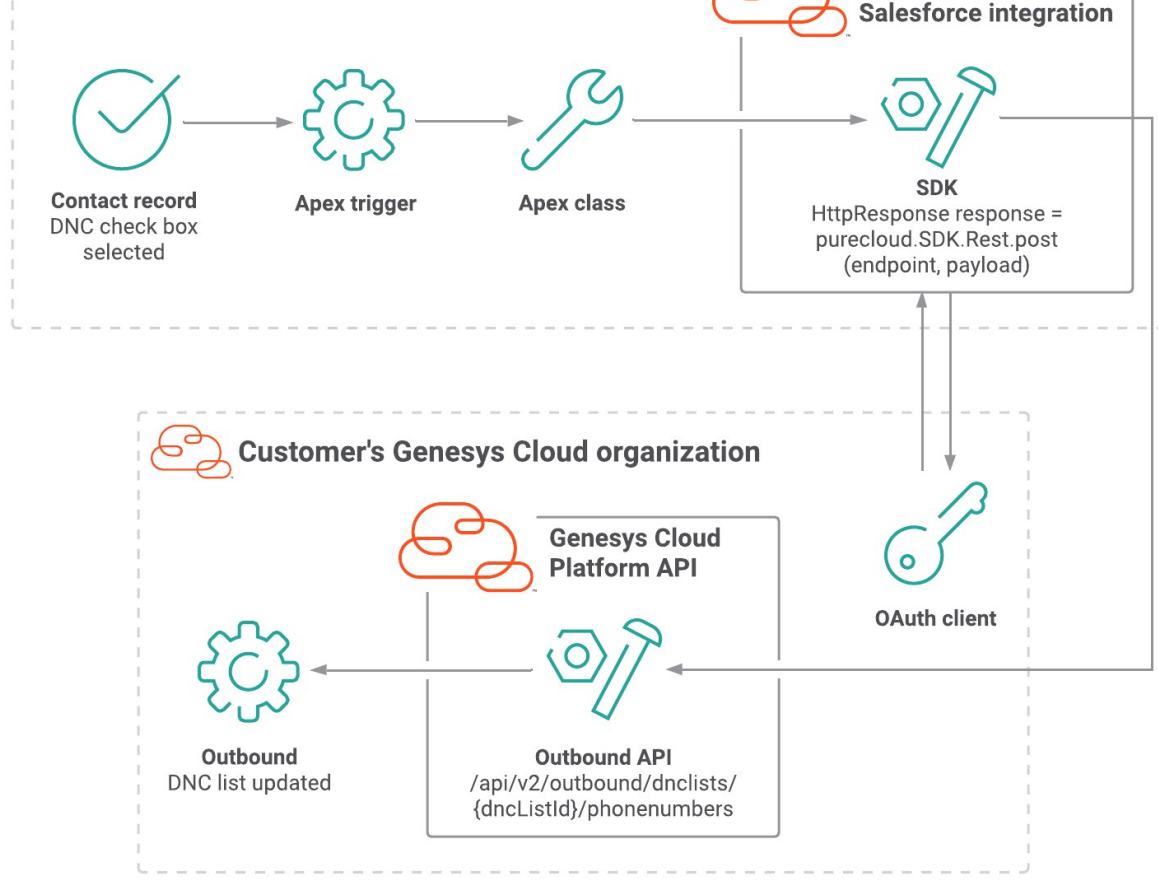Genesys Cloud

Developer Center

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Update a Genesys Cloud Do Not Contact list with the Genesys Cloud for Salesforce SDK

This Genesys Cloud Developer Blueprint illustrates how to use the Genesys Cloud for Salesforce SDK to add the primary phone number of a Salesforce Contact to a Genesys Cloud Do Not Contact (DNC) list. The management of DNC lists is a crucial component to campaign management. In Genesys Cloud, you create and manage DNC lists. With the Genesys Cloud for Salesforce SDK, you can integrate these lists into your Salesforce organization.

This blueprint is fully functional, but outlines a simple implementation. For a more robust implementation, you can modify it to handle multiple phone number fields (home, mobile, other) or change the code to handle bulk insert and update operations. For more information, see the Additional resources section.

* Solution components
* Prerequisites
* Implementation steps
* Additional resources

Solution components

* **Genesys Cloud** - A suite of Genesys cloud services for enterprise-grade communications, collaboration, and contact center management. You create and manage DNC lists and OAuth clients in Genesys Cloud.
* **Salesforce** - The Salesforce cloud customer relationship management (CRM) platform.
* **Genesys Cloud for Salesforce** - The Genesys Cloud integration that embeds Genesys Cloud inside Salesforce.
* **Genesys Cloud for Salesforce managed package** - The managed package that contains all the installation components, including the Genesys Cloud for Salesforce SDK, necessary to run Genesys Cloud for Salesforce.
* **Genesys Cloud for Salesforce SDK** - Allows you to customize actions in Genesys Cloud for Salesforce. This SDK is included in the managed package and uses the Salesforce Apex programming language.

Prerequisites

Specialized knowledge

* Administrator-level knowledge of Genesys Cloud
* Administrator-level knowledge of Salesforce and programming experience with Apex code

Genesys Cloud account

* A Genesys Cloud license. For more information, see Genesys Cloud pricing ☐ on the Genesys website.
* The solutions engineer assigned the **Integration > Salesforce > Agent** permission. For more information, see Administrator requirements for the Genesys Cloud embedded clients ☐ in the Genesys Cloud Resource Center.
* An OAuth client with roles that are assigned the Campaign Management permissions and the **Outbound > DNC List > Add** permission. For more information, see OAuth client permissions for Genesys Cloud for Salesforce ☐ and Create an OAuth client ☐ in the Genesys Cloud Resource Center.

Salesforce account

* A Salesforce organization with the Genesys Cloud for Salesforce integration installed and configured. For more information, see Install or upgrade the Genesys Cloud for Salesforce managed package ☐ and Set up a call center in Salesforce ☐ in the Genesys Cloud Resource Center.
* The Salesforce organization and the Genesys Cloud for Salesforce integration configured for campaign management. For more information, see Set up campaign management in Genesys Cloud for Salesforce ☐ in the Genesys Cloud Resource Center.
* The solutions engineer assigned a System Administrator profile. For more information, see Standard Profiles ☐ in the Salesforce documentation.

Implementation steps

* Create an internal DNC list in Genesys Cloud
* Create a custom setting in Salesforce
* Configure the Do Not Call field in Salesforce
* Create an Apex trigger and class
* Test your work

Create an internal DNC list in Genesys Cloud

1. In your Genesys Cloud organization, create an internal DNC list.

   The assets/data/ folder in GitHub contains an example .csv file that you use. For more information, see the genesys-cloud-for-salesforce-sdk-dnclist-example ☐ repository in GitHub and Create a new internal DNC list ☐ in the Genesys Cloud Resource Center.

2. Copy and save the ID of the DNC list.

   You will use this ID after you create a custom field. See the Create a custom setting in Salesforce section.

Create a custom setting in Salesforce

Use a custom setting to store the ID of the DNC list.

1. Create a custom setting with following values:

   Note: If **Setting Type** is grayed out, enable **Manage List Custom Settings Type**. For more information, see List Custom Setting is greyed out ☐ in the Salesforce documentation.

   * **Object Name**: Genesys_Cloud_DNC_List
   * **Setting Type**: List

   For more information, see Create Custom Settings ☐ in the Salesforce documentation.

2. Add a custom field to the custom setting with the following values:

   Note: Length must be at least 36.

   * **Data Type**: Text
   * **Length**: 36
   * **Field Name**: DNC_List_Id

   For more information, see Add Custom Settings Fields ☐ in the Salesforce documentation.

3. Add the ID of the DNC list to the custom field.

   a. Click **Setup**.
   b. Search for and click **Custom Settings**.
   c. Click **Manage** next to Genesys_Cloud_DNC_List. You created this custom field in step 1.
   d. Click **New**.
   e. For **Name**, enter **DNC_List_Id**.
   f. For **DNC_List_Id**, enter the ID of the DNC list that you copied and saved earlier. See the Create an internal DNC list in Genesys Cloud section.
   g. Click **Save**.

### Configure the Do Not Call field in Salesforce

This field is hidden by default. Make the field visible to profiles and then add the field to **Contact Layout**.

1. Set **Field-Level Security** for the field called **Do Not Call** to **Visible**.

   a. Find the Contact field called **Do Not Call**.
   b. Click **Set Field-Level Security**.
   c. Under **Visible**, select the profiles that you want to be able to see the **Do Not Call** field.
   d. Click **Save**.

   For more information, see Set Field-Level Security for a Single Field on All Profiles ☐ in the Salesforce documentation.

2. Add **Do Not Call** to **Contact Layout**.

   a. Open the page layout for Contacts.
   b. Drag the **Do Not Call** field to the **Contact Information** section.
   c. Click **Save**.

   For more information, see Page Layouts ☐ in the Salesforce documentation.
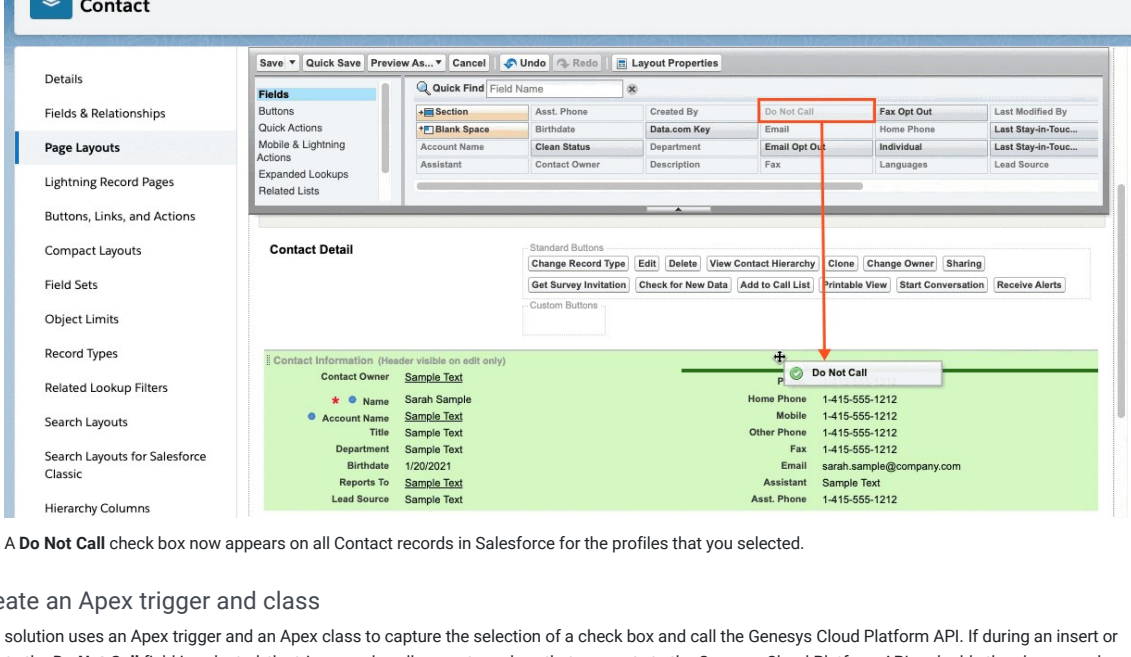
A **Do Not Call** check box now appears on all Contact records in Salesforce for the profiles that you selected.

Create an Apex trigger and class

This solution uses an Apex trigger and an Apex class to capture the selection of a check box and call the Genesys Cloud Platform API. If during an insert or update the **Do Not Call** field is selected, the trigger code calls a custom class that connects to the Genesys Cloud Platform API and adds the phone number of the Contact to the DNC list.

Because the SDK makes asynchronous calls to the Genesys Cloud Platform API, the class method must include a future annotation. The future annotation designates the callout as asynchronous.

For more information, see Classes ☐ and Future Annotation ☐ in the Salesforce Apex Developer Guide.

1. Create the DoNotCallManager class in Salesforce

   a. In the Developer Console, click **File > New > Apex Class**.
   b. For the class name, enter **DoNotCallManager** and then click **OK**.
   c. Replace the default code with the code found at src/classes/DoNotCallManager.cls.
   d. Save the file.

   Tip: The addPhoneNumber method in the DoNotCallManager class uses the SDK to add the phone number to the DNC list with a POST request to /api/v2/outbound/dnclists/{dncListId}/phonenumbers. This endpoint only adds a single phone number per request, but this endpoint can handle multiple phone numbers in a single request.

   The following Apex code is a simplified example of the SDK request in the addPhoneNumber method. The code uses the POST method of the SDK to send a request containing an array of phone numbers to the API endpoint.

   ```
   String payload = JSON.serialize(new List<String>{ phoneNumber });

   HttpResponse response = purecloud.SDK.Rest.post(
   '/api/v2/outbound/dnclists/{dncListId}/phonenumbers', payload );
   ```

2. Create the **Contact** trigger in Salesforce

   a. In the Developer Console, click **File > New > Apex Trigger**.
   b. For **Name**, enter **ContactTrigger**.
   c. For **sObject**, select **Contact**.
   d. Replace the default code with the code found at src/triggers/ContactTrigger.trigger.
   e. Save the file.

Test your work

1. In Salesforce, create a **Contact** and select the **Do Not Call** check box.
2. In Genesys Cloud, export the DNC list that you created earlier.

   The phone number of your new Contact appears in the exported .csv file. For more information, see Download DNC records ☐ in the Genesys Cloud Resource Center.

Additional resources

* Do not contact lists view ☐ in the Genesys Cloud Resource Center
* Salesforce Execution Governors and Limits ☐ in the Salesforce Apex Developer Guide
* Bulk Triggers ☐ in the Salesforce Apex Developer Guide
* Troubleshoot the Genesys Cloud embedded clients ☐ in the Genesys Cloud Resource Center
* Platform API Troubleshooting ☐
* About Genesys Cloud for Salesforce ☐ in the Genesys Cloud Resource Center
* About Campaign Management in Genesys Cloud for Salesforce ☐ in the Genesys Cloud Resource Center
* The genesys-cloud-for-salesforce-sdk-dnclist-example ☐ repository in GitHub

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YAAAAARRRRRRRRGGGGGGHHHHHH!!!!