ResourceCenter

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About the Salesforce data actions integration

The Salesforce data actions integration uses static and custom actions to act on data in Salesforce.

Overview

The Salesforce data actions integration provides static actions and allows you to create custom actions that you can use throughout Genesys Cloud to act on data in Salesforce. You can use these data actions to make routing decisions within your interaction flow in Architect, to present information to your agents in Scripts, or to act on data in other ways.

- Content list
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Get started

Review the requirements. After you add the integration, either create a custom action or use a static action that the integration automatically generated.

- Requirements
- Add the integration
- Create a custom action
- Use a data action

Migrate

The Salesforce data actions integration, which runs as a Genesys Cloud service, replaces the previous Salesforce data dip connector, which ran on the Genesys Cloud Bridge Server. Learn how to migrate your interaction flows in Architect from bridge actions to data actions.

- Migrate interaction flows

Security

You can use several mechanisms to further secure your web service endpoints when you use data actions. These mechanisms help ensure that only data actions and no unrelated parties communicate with your endpoints.

- Security for data actions

Troubleshoot

Browse information about common issues. Test data actions for help debugging issues.

- Troubleshoot
- Test data actions

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