

A central repo to store various code examples for the PureCloud for Salesforce integration

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amym-genesys Updated example description and list of acti...

on Nov 2, 2020

History

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## Genesys Cloud for Salesforce SDK CTI extensions

This repository contains an example that allows Genesys Cloud for Salesforce users to extend functionality through the Salesforce SDK CTI extensions.

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# Getting started

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## Prerequisites

- A version of the [Genesys Cloud for Salesforce](#) managed package installed in your Salesforce organization that supports CTI extensions.
- Record types in your Salesforce organization. For more information, see [Tailor Business Processes to Different Users Using Record Types](#).

## Background information

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The Salesforce SDK contains a set of interfaces that allow developers to extend specific Salesforce Open CTI methods in the Genesys Cloud for Salesforce integration.

- `purecloud.CTIExtension.ClickToDial`
- `purecloud.CTIExtension.ScreenPop`
- `purecloud.CTIExtension.SaveLog`

To use the CTI extensions, implement one or more interfaces in an Apex class and select the Apex class in the Salesforce managed package settings.

## Example

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This example uses the `purecloud.CTIExtension.saveLog` interface to save an interaction log to a record type. The example performs the following actions:

- Gets an interaction and an interaction log from event data.
- Instantiates a new or an existing Task object based on the interaction log.
- If the interaction is outbound, sets a record type on the Task object.
- Saves the Task object and returns its ID.

To implement the example, follow these steps.

1. [Create an Apex class](#).
2. [Configure the extension points in the managed package](#).

## Create an Apex class

In Salesforce, create an Apex class that implements `purecloud.CTIExtensions.saveLog`.

1. In Salesforce, open **Developer Console**.
2. Click **File > New > Apex Class**.
3. For the name of the class, enter **CustomCTIExtensions**.
4. Replace the content for the class with the following example code.

```
global with sharing class CustomCTIExtensions implements
purecloud.CTIExtension.SaveLog
{

    public String onSaveLog(String data) {
        Map<String, Object> eventData = (Map<String, Object>)
JSON.deserializeUntyped(data);
        Map<String, Object> interaction = ( Map<String, Object>)
eventData.get('interaction');
        Map<String, Object> callLog = ( Map<String, Object>)
eventData.get('callLog');
        String direction = (String)interaction.get('direction');
        String callLogId = '';

        Map<String, Schema.RecordTypeInfo> recordTypes =
Schema.SObjectType.Task.getRecordTypeInfoByName();
        Task t = (Task) JSON.deserialize(JSON.serialize(callLog),
Task.class);
        if (direction.toLowerCase() == 'outbound') {
            Schema.RecordTypeInfo selectedType = recordTypes.get('Sales
Record Type');
            t.recordTypeId = selectedType.recordTypeId;
        }

        upsert t;
        callLogId = t.Id;

        return callLogId;
    }

}
```

5. Save the file.

## Configure the extension points in the managed package

In Salesforce, configure the extension points in the managed package to use the Apex class that you created.

1. In Salesforce, click **Setup**.

2. Search for **Installed Packages**.
3. Under **Build**, click **Installed Packages**.
4. On the **Installed Packages** page, click **Configure** next to the Genesys Cloud for Salesforce package.
5. Under **Choose a Call Center**, select a version of the call center definition.
6. Under **Extension Point Settings**, select the Apex class that you created.
7. Click **Save**.

## Additional information

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- [Extension points in Genesys Cloud for Salesforce](#) (Genesys Cloud Resource Center).
- [Use the extension points to customize saving interaction logs](#) (Genesys Cloud Resource Center).
- [Configure extension points](#) (Genesys Cloud Resource Center).
- [About Genesys Cloud for Salesforce](#) (Genesys Cloud Resource Center).

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