



Configuring Salesforce

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Contents

1. Salesforce	3
1.1 Agent Experience	3
1.2 Supervisor Experience	4
1.3 Prerequisites	4
1.4 What Next?	4
2. Configuring the Web API	5
2.1 AppSettings Group	5
2.2 ConnectionStrings Group	6
2.3 What Next?	7
3. Configuring the Universe	8
3.1 Add a Data Source	8
3.2 Add a Data Source Object	9
3.3 What Next?	11

1. Salesforce

This document describes how to configure Syntelate XA to connect to Salesforce. Syntelate XA has a built-in web API for Salesforce. To use your Salesforce data in Syntelate XA, you need to:

1. Edit the settings of the Syntelate XA web API for Salesforce.
2. Edit your Syntelate XA universe.
3. Edit your Syntelate XA Agent Desktop.

You edit the web API's configuration settings so that it connects to your Salesforce API. When you have established the connection between the two APIs, you need to configure your Syntelate XA universe so that it knows which database tables and fields in Salesforce to retrieve data from and write data to. And when you've completed that task, you need to edit your Syntelate XA Agent Desktop so that agents can see and edit data in Salesforce.

1.1 Agent Experience

When agents are handling a customer interaction on their Syntelate XA Agent Desktop, they will see any customer data that exists in Salesforce and which you have configured access to in your Syntelate XA Universe.

If no customer data exists for that customer yet, the agent can capture details using the agent desktop, which will save the data to your Salesforce database.

In other words, the Syntelate XA Agent Desktop acts as an interface between an agent and your Salesforce instance.

1.2 Supervisor Experience

Supervisors and system administrators can use Designer to specify which database tables and fields in Salesforce should be displayed on the agent desktop.

1.3 Prerequisites

Before you get started, you need to have the following:

- » A Syntelate XA Designer account.
- » A Salesforce API account. From there, you need to get the following details:
 - » The absolute URL of your Salesforce instance.
 - » Salesforce Client ID.
 - » Salesforce Client Secret.

You need those details when you're configuring Syntelate XA to connect to your Salesforce instance. If you need assistance finding those API details, we recommend you refer to the [Salesforce REST API Developer Guide](#).

1.4 What Next?

Your first step is to follow the instructions given in [Configuring the Web API](#) on the next page.

2. Configuring the Web API

The Salesforce Web API in Syntelate XA is controlled by configuration settings. You need to edit some of those settings to create a connection between Syntelate XA and your [Salesforce instance](#).

Follow the instructions below.

2.1 AppSettings Group

1. In your preferred Windows file system viewer, such as Explorer, open your Syntelate XA file directory.
2. Navigate to the Salesforce subdirectory. You see a WebAPI subdirectory.
3. Enter the WebAPI subdirectory.
4. Find and open the file named Web.config, using a text editor such as Notepad.
5. Find the `<appSettings>` group. It defines a number of configuration keys.
6. Edit the values of the following keys:

```
<add key="InstanceURI" value="" /> <!-- The absolute URL to your Salesforce instance. -->
```

```
<add key="SalesforceCannotUpdateFields" value="contact.NAME" /> <!-- The table fields in Salesforce that must not be updated by Syntelate XA. -->
```

```
<add key="PicklistUpdateJobStartTime" value="08:55" /> <!-- Specify the time when you need Salesforce to run the Update Picklists job. -->
```

```
<add key="PicklistUpdateJobRefreshTimerSeconds" value="864000" /> <!--
Specify how frequently you want Salesforce to run the Update Picklist job.
For example, 864000 seconds is 24 hours. -->
```

2.2 ConnectionStrings Group

1. Find the group `<connectionStrings>`.
2. Edit as shown:

```
<connectionStrings>
```

```
  <add name="synXaDatabase" connectionString="Data
Source=YourDatabaseServerName;User
ID=UsernameForAccessingYourDatabaseServer;Initial
Catalog=NameOfYourSyntelateXADatabase;Password=PasswordForYourDatabaseServer"
providerName="System.Data.SqlClient" />
```

```
  <!-- edit the connectionString value according to your Syntelate XA
server and database details. -->
```

```
</connectionStrings>
```

3. Save and close Web.config.

You have completed the configuration of the Salesforce Web API in your Syntelate XA instance.

2.3 What Next?

You need to edit your Syntelate XA universe. Follow the instructions at [Configuring the Universe](#) on the next page.

3. Configuring the Universe

In your Syntelate XA universe, you need to specify which database tables and fields in Salesforce are required for use in Syntelate XA. Follow the instructions below.


3.1 Add a Data Source

1. Go to Universe Builder and open the universe that is being used by your Syntelate XA agent desktop. You see the universe's configuration screen.
2. Add a new data source. You see the **Add Data Source** dialog.
3. For **Data source type**, choose Salesforce API.
4. For **Data source name**, enter Salesforce.
5. For **Connection string**, enter the absolute URL of your Salesforce Web API within your Syntelate XA instance.
6. **SAVE AND CLOSE.**


You return to the Universe configuration screen.

3.2 Add a Data Source Object


1. Add a new data source object. You see the **Add Data Source Object** dialog.
2. For **Data Source**, choose Salesforce.
3. For **Description**, enter something that defines what this data source object will be used for, such as Salesforce Contacts if the object will be used to display and edit customer contact details.
4. **SAVE AND CONTINUE**. You see the **Edit Data Source Object** dialog.
5. For **Data source object type**, in most cases you will need either Parent, Grid or Interaction table. Only choose Grid stored procedure or Linked table if you know for certain that's what you need.
6. For **Data source object name**, choose the table that corresponds to the category of data that you're wanting this data source object to pull from Salesforce. For example, if you want to retrieve customer contact details, then you would choose the table that stores those details.
7. **Primary key**: This is automatically populated after you specify the **Data source object name**.
8. **Use as search query?** Lets you create a search table from the Salesforce data source object. (The search table will be a view.) As a result, agents will be able to search Salesforce data from their Syntelate XA Agent Desktop.


 **Note:** When **Use as search query?** is **Yes**, the asterisk wildcard is appended to search terms. For example, if an agent searches for Ann, the search will look for Ann*.

9. **Select query string** lets you write a SOQL (Salesforce Object Query Language) select statement to retrieve data from the Salesforce database table that you specified in Data source object name. To provide a SOQL select statement, in Select query string, write or paste the SOQL statement.

 **Tip:** You should use this option if you need to display data from linked objects or you want to order the data. For example, to order sales orders by create date.

10. If you do not need to use SOQL queries, you can choose fields from the list provided. From **Required fields**, select each field you want to include in the data source object.

 **Tip:** If you are entering a SOQL query, you should also use the list of fields if you want to create picklists for them (in other words, to create Salesforce code tables).

 **Note:** The type lists SOQL data types, not SQL data types.

11. **SAVE AND CLOSE.**

Saving your Salesforce data source object results in the following events:

- » A view is created in the Syntelate XA database.
- » Code tables are created for any selected fields that are of the type picklist.
- » Field properties are added to the code tables.
- » The code tables are populated.

Your data source object is ready for use.



Names of Salesforce views in Syntelate XA follow a convention to ensure your data source object is unique. The convention is SFNN_DATASOURCEOBJECTNAME, where:

- » SF: the view is of a Salesforce data source object.
- » NN: the number of your universe.
- » DATASOURCEOBJECTNAME: the name you created for the data source object. For search views, the name will be automatically prefixed by SEARCH.

3.3 What Next?

When you have created the data source objects that your Salesforce project requires, you need to configure the Syntelate XA Agent Desktop to ensure agents will be able to view and edit the data in Salesforce. This will involve configuring:

- » Data entry elements that display information from Salesforce, such as text boxes that display customer details.
- » Grids that display records from Salesforce, such as a list of a customer's orders.
- » Grids that agents can search, for example, to look for a customer's address.

Refer to the document, *Syntelate XA - Designer* for guidance.

Support and Training

Questions? Contact Inisoft Support (+44 (0)800 668 1290, support@inisoft.com).

Interested in training for your call center? Then why not get in touch? Email us at sales@inisoft.com and ask to speak to our Professional Services team.