DVSAnalytics

Salesforce

Integration Guide

Encore Workforce Optimization Solution
Version 8.4 or later

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encore

For Dealer and Customer Use Only

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Introduction

The Encore Salesforce integration allows data to be shared between the Encore Workforce Optimization system and the Salesforce Enterprise CRM platform. It also allows the user to play an Encore call recording from a link within Salesforce.

The Encore system integrates with Salesforce using VisualForce pages on the Account, Case, Contact, Opportunity, and Task pages to send data to be associated with the Encore call recording record. The Salesforce data captured in the Encore call record is:

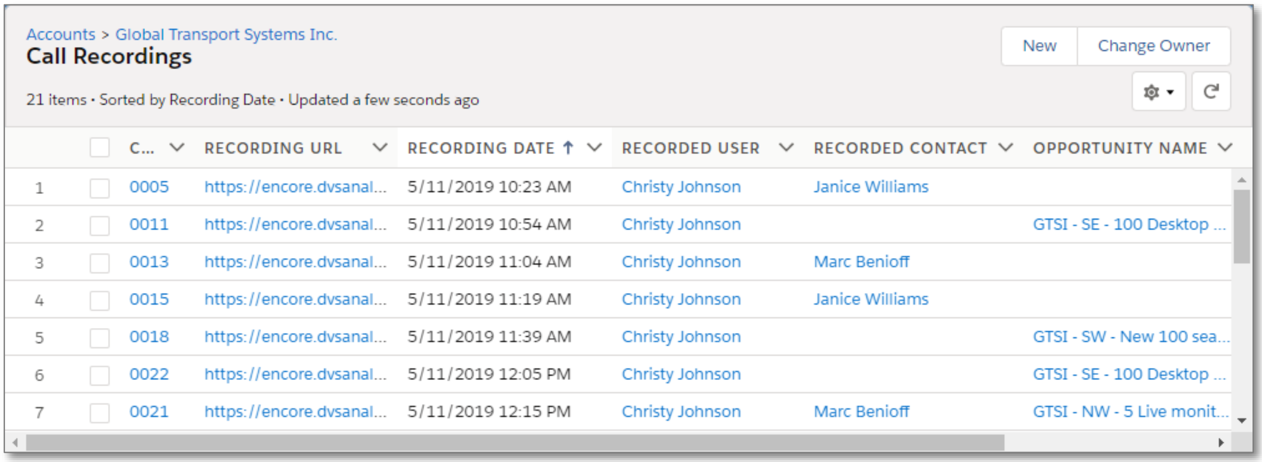
FIELD	DESCRIPTION
SF Account ID	The ID of the Salesforce account the recorded user accessed either shortly before or during a call. If the recorded user opened more than one account either shortly before or during a call, only the last account ID accessed is associated with the recording. If the recorded user did not open any account, contact, or opportunity shortly before or during a call, this field is blank. This field is typically not displayed in the call record.
SF Account Name	The name of the Salesforce account. This field is populated based on the same rules as the account ID.
SF Case ID	The ID of the Salesforce case. If the recorded user did not open a case record shortly before or during a call, this field is blank.
SF Case Number	The ID of the Salesforce case. If the recorded user did not open a case record shortly before or during a call, this field is blank.
SF Contact ID	The ID of the Salesforce contact the recorded user accessed either shortly before or during a call. If the recorded user opened more than one contact either shortly before or during a call, only the last contact accessed is associated with the recording. If the recorded user did not open any contact shortly before or during a call, this field is blank. This field is typically not displayed in the call record.
SF Contact Name	The name of the contact in the format “lastname,firstname”. This field is populated based on the same rules as the contact ID.
Email Address	The email address of the contact. This field is populated based on the same rules as the contact ID.
SF Oppt ID	The ID of the Salesforce opportunity the recorded user accessed either shortly before or during a call. If the recorded user opened more than one opportunity either shortly before or during a call, only the last opportunity accessed is associated with the recording. If the recorded user did not open any opportunity shortly before or during a call, this field is blank. This field is typically not displayed in the call record.
SF Oppt Name	The name of the opportunity. This field is populated based on the same rules as the opportunity ID.
Task Subject	The task subject of the Salesforce task the recorded user accessed either shortly before or during a call. If the recorded user opened more than one task either shortly before or during a call, only the last task accessed is associated with the recording. If the recorded user did not open any task shortly before or during a call, this field is blank.
SF T Link	The link to the call recording in the task Recording Link field. This field is populated based on the same rules as the Task Subject. This field is typically not displayed in the call record.
Task Due Date	The due date of the Salesforce task. If the recorded user did not open a task record shortly before or during a call, this field is blank.
Task Status	The status of the Salesforce task. If the recorded user did not open a task record shortly before or during a call, this field is blank.

FIELD	DESCRIPTION
Task Subtype	The subtype of the Salesforce task. If the recorded user did not open a task record shortly before or during a call, this field is blank.
Task Related To	The object that is related to the Salesforce task. If the recorded user did not open a task record shortly before or during a call, this field is blank.
Task Call Result	The call result of the Salesforce task. If the recorded user did not open a task record shortly before or during a call, this field is blank.
SF User ID	The ID of the Salesforce user. If the recorded user did not open any account, contact, or opportunity shortly before or during a call, this field is blank. This field is typically not displayed in the call record.

The Encore system uses the Salesforce Data Loader utility to import the following data into the new Salesforce Call Recording table:

- **Call Recording Number** – This field isn't imported but is auto-generated by the import process to give each recording record a unique Salesforce ID.
- **Account Name** – Name of the associated account which is also a link to the account record. This is always populated.
- **Recording URL** – The URL link to the recording. If clicked, it opens the **Encore Streaming Player** and plays the audio record. This is always populated.
- **Recording Date** – The date and time the call recording started. This is always populated.
- **Agent Name** – The name of the Encore recorded agent. This is always populated.
- **Recorded User** – The associated Salesforce user name which is also a link to the user record. This is always populated.
- **Recording Index** – The index of the Encore call recording record. This is always populated.
- **Recorded Contact** – Name of the associated contact which is also a link to the contact record. This is only populated if a contact was opened either during a recorded call or opened within an hour prior to the recorded call and no other calls occurred during this time for this user.
- **Opportunity Name** – Name of the associated opportunity which is also a link to the opportunity record. This is only populated if an opportunity was opened either during a recorded call or opened within an hour prior to the recorded call and no other calls occurred during this time for this user.
- **Case Number** – Number of the associated case which is also a link to the case record. This is only populated if a case was opened either during a recorded call or opened within an hour prior to the recorded call and no other calls occurred during this time for this user.
- **Task Subject** – The task subject of the associated task which is also a link to the task record. This is only populated if a task was opened either during a recorded call or opened within an hour prior to the recorded call and no other calls occurred during this time for this user.

Here is an example of the call recording data in Salesforce Lightning Experience:


Accounts > Global Transport Systems Inc.

Call Recordings

New | Change Owner

21 items • Sorted by Recording Date • Updated a few seconds ago

	C...	RECORDING URL	RECORDING DATE	RECORDED USER	RECORDED CONTACT	OPPORTUNITY NAME
1	0005	https://encore.dvsanal...	5/11/2019 10:23 AM	Christy Johnson	Janice Williams	
2	0011	https://encore.dvsanal...	5/11/2019 10:54 AM	Christy Johnson		GTSI - SE - 100 Desktop ...
3	0013	https://encore.dvsanal...	5/11/2019 11:04 AM	Christy Johnson	Marc Benioff	
4	0015	https://encore.dvsanal...	5/11/2019 11:19 AM	Christy Johnson	Janice Williams	
5	0018	https://encore.dvsanal...	5/11/2019 11:39 AM	Christy Johnson		GTSI - SW - New 100 sea...
6	0022	https://encore.dvsanal...	5/11/2019 12:05 PM	Christy Johnson		GTSI - SE - 100 Desktop ...
7	0021	https://encore.dvsanal...	5/11/2019 12:15 PM	Christy Johnson	Marc Benioff	GTSI - NW - 5 Live monit...

The call recording data is also available in Salesforce Classic.

Getting Started

This document describes the steps necessary to complete the installation of the Encore Salesforce components in the Salesforce production system. It is assumed that the person reading this document and following the steps has a Salesforce account with a System Administrator profile.

TYPICAL DIRECTORY LOCATION	REFERENCE NAME
C:\Salesforce	**SFDir – This is the Salesforce directory** on the Encore Primary Server**. It must not be changed.**

NOTE

Not every organization uses the **Opportunity** or **Case** object. If your organization does not use opportunities or cases, you don't need perform the tasks on the **Opportunity** or **Case** object.

NOTE

You have the option to associate Salesforce data with all call recordings or only external call recordings. Your DVS installation technician will ask which you prefer. Considerations for associating the Salesforce data with internal calls: If an agent calls his/her manager while a Salesforce record is open on the desktop, the call to the manager will be associated to that Salesforce record, including a link to the recording. The call may or may not be related to the Salesforce record.

Step 1 – Create Sandbox

Create a sandbox to use for testing the Encore Salesforce integration. There will be changes made to the sandbox that will be deployed to the Production system so the sandbox must be based on the current production system. Testing on the sandbox requires the use of sample account, contact and opportunity records so it is recommended to create a **Partial Copy** sandbox. If you create a Developer sandbox, you will need to manually create a one or more account, contact and opportunity records.

If the Encore Primary Server is outside of your company's Salesforce trusted networks, you need the security token for your Salesforce password. If you don't have a security token on the sandbox or don't remember the security token value, follow these steps to create/reset a security token:

- Log into the sandbox.
- From your **Personal Settings**, enter 'reset my security token' in the **Quick Find** box and select 'Reset My Security Token'.
- Copy the security token value for use in the next step. If the security token is used by other applications on the sandbox, they need to be updated to use the new token.

Step 2 – Deploy Encore Integration to Sandbox

Check for Salesforce Account validation rules:

1. Log into the sandbox.
2. Click the **Setup** icon and select the **Setup** option.
3. In the left panel, click **Objects and Fields** and then **Object Manager**.
4. Click **Account** in the list and then click **Validation Rules** in the left panel.
5. If there are validation rules, you will need to disable them before deploying the Encore integration.

Deploy Encore integration:

1. Log on to the Encore Primary Server. Your DVS Installation Engineer will provide you with the credentials.
2. Use Notepad or Notepad++ to edit: **SFDir\Deployment\Build.properties**.
3. Set sf.username to your sandbox Salesforce user name. For example: If the production user name is admin@abc.com and the sandbox name is EncoreTest, then the sandbox user is admin@abc.com.EncoreTest.
4. Set sf.password to your Salesforce password. If a security token is needed, it is added at the end of the password.
5. Verify the **sf.serverurl** setting is set to https://test.salesforce.com
6. Save and close **Build.properties**.
7. Run **SFDir\Deployment\deployEncore.cmd**. You will see several commands on the screen. Wait until you see "BUILD SUCCESSFUL". Press any key to close the window.
8. When the deployment is successful, use Notepad or Notepad++ to edit: **SFDir\Deployment\Build.properties** and delete the user name and password values.
9. Save and close **Build.properties**.

Step 3 – Check Deployment Status

This step assumes the user is logged into the Salesforce **Sandbox** system. To check the Deployment status:

1. Click the **Setup** icon and select the **Setup** option.
2. In the **Quick Find** box, type: deployment
3. Click on **Deployment Status**.
4. Verify the most recent deployment is successful.
5. If not successful, contact your DVS Installation Technician before continuing.

If you wish to review the Encore deployment package components:

1. Click the **Setup** icon and select the **Setup** option.
2. In the **Quick Find** box, type: package
3. Click on **Package Manager**.
4. Click on **EncorePackage** and review the components

Step 4 – Add Computer Login

If you are installing an upgrade to the Encore Salesforce integration, you can skip this step. This step assumes the user is logged into the Salesforce **Sandbox** system.

1. Click the **Setup** icon and select the **Setup** option.
2. On the left panel, click **Users** and then **Profiles**.
3. Click on the **System Administrator** profile.
4. In the Standard Object Layouts section, click on **User Layout**.
5. Drag the **Computer Login ID** box to the **Additional Information** section.
6. Click **Save**.
7. Click the **Setup** icon and select the **Setup** option.
8. On the left panel, click **Users** and then **Users**.
9. Find your account and select Edit.
10. In the **Computer Login Id** field in the **Additional Information section**, enter your Windows computer login ID.
11. Click **Save**.

Step 5 – Add Recording Link to Task

If you are installing an upgrade to the Encore Salesforce integration and your integration already has the **Recording Link** in the **Task** layout, you can skip this step. This step assumes the user is logged into the Salesforce **Sandbox** system.

1. Click the **Setup** icon and select the **Setup** option.
2. In the left panel, click **Objects and Fields** and then **Object Manager**.
3. Click Task in the list and then click **Page Layouts** in the left panel. If there is more than one page layout for Task, you will need to modify each page layout
4. Drag the **Recording Link** field to the **Task Information** section.
5. Click **Save**.

Step 6 – Embed VisualForce Page and Recording List

This step assumes the user is logged into the Salesforce **Sandbox** system. Follow these steps for the Account, Contact, Case and Opportunity object. Start with Account object, and then repeat with Contact object. If you are using the Case object, complete the steps for Case. If you are using the Opportunity object, complete the steps for Opportunity.

1. Click the **Setup** icon and select the **Setup** option.
2. In the left panel, click **Objects and Fields** and then **Object Manager**.
3. Click the (**Account, Contact, Case or Opportunity)** in the list and then click **Page Layouts** in the left panel. If there is more than one page layout for an object, you will need to modify each page layout that needs the Call Recordings related list.
4. If you are upgrading the Salesforce Integration, click the (**Account, Contact, Case or Opportunity) Layout** link, find the **Call Recordings** related list, delete it, and save the **Page Layout.**
5. Click the (**Account, Contact, Case or Opportunity) Layout** link and click **Related Lists** in the list in the (**Account, Contact or Opportunity) Layout** section.
6. Click and drag **Call Recordings** to the **Related Lists** section and drop it where you want in the list.
7. Click on the **Related List Properties** icon on the **Call Recordings** tab header.

8. Based on which object you are currently modifying; we suggest the following. If you are not using an object such as **Case** or **Opportunity**, do not add that field to the selected fields.

    a) **Account** – Move **Recording URL**, **Recording Date**, **Recorded User, Recorded Contact, Case Number**, **Opportunity Name**, **Task Subject**, **Duration (secs)**, **Call Direction**, and **Call Type** from **Available Fields** to **Selected Fields**. For the **Sort By** settings, select **Recording Date** and **Descending**.

    b) **Contact** – Move **Recording URL**, **Recording Date**, **Recorded User, Account Name, Case Number**, **Opportunity Name**, **Task Subject**, **Duration (secs)**, **Call Direction**, and **Call Type** from **Available Fields** to **Selected Fields**. For the **Sort By** settings, select **Recording Date** and **Descending**.

    c) **Opportunity** – Move **Recording URL, Recording Date**, **Recorded User, Account Name, Recorded Contact**, **Case Number**, **Task Subject**, **Duration (secs)**, **Call Direction**, and **Call Type** from **Available Fields** to **Selected Fields**. For the **Sort By** settings, select **Recording Date** and **Descending**.

    d) **Case** – Move **Recording URL, Recording Date**, **Recorded User, Recorded Contact, Account Name**, **Opportunity Name**, **Task Subject**, **Duration (secs)**, **Call Direction**, and **Call Type** from **Available Fields** to **Selected Fields**. For the **Sort By** settings, select **Recording Date** and **Descending**.

9. Click **OK** to save the Call Recording layout properties.
10. Scroll to the top of the page and click the **Visualforce Pages** in the list in the (**Account, Contact, Case or Opportunity) Layout** section. If upgrading Encore Salesforce integration, steps 10 and 11 only need to be completed it you are adding a new object, such as Case.
11. Based on which object you are currently modifying, do the following:

    a) **Account** – Drag the **blankAccountWS** button and drop it at the bottom of the **Account Summary** Section. Double-click the **blankAccountWS** blue box, change the **Height** value to **5** and click OK.

    b) **Contact** – Drag the **blankContactWS** button and drop it at the bottom of the **Address Information** section. Double-click the **blankContactWS** blue box, change the **Height** value to **5** and click OK.

    c) **Opportunity** – Drag **blankOpportunityWS** button and drop it at the bottom of the **Additional Information** section. Double-click the **blankOpportunityWS** blue box, change the **Height** value to **5** and click OK.

    d) **Case** – Drag **blankCaseWS** button and drop it at the bottom of the **Additional Information** section. Double-click the **blankCaseWS** blue box, change the **Height** value to **5** and click OK.

12. Scroll to the top and click **Save** the (**Account, Contact or Opportunity) Layout** section,
13. Click **No** to **Overwrite Users' related List Customizations**.
14. Repeat steps 1 through 13 for next object.
15. Once all three objects have been modified, return to home page.

Step 7 – Update Lightning Page Layouts

If you are installing an upgrade to the Encore Salesforce integration, you only need to perform this step for a new object, such as **Opportunity**, **Case,** or **Task** object, otherwise complete this step for all objects you use. This step assumes the user is logged into the Salesforce **Sandbox** system. Follow these steps for the Account, Contact, Opportunity, Case, and Task page layout. Start with Account, then repeat with each object you are using.

1. Click on the (**Account, Contact, Opportunity**, **Case**, **Task**) tab.
2. Click on an (**Account, Contact, Opportunity**, **Case**, **Task**) **record** from the (**Account, Contact, Opportunity**, **Case**, **Task**) **List**.
3. On the top right corner, click the **Setup** icon and select **Edit Page**.
4. Scroll to the bottom of the **Lightning Components** list in the left panel.
5. Click and drag **Visualforce** to the bottom of the (**Account, Contact, Opportunity**, **Case**, **Task**) **Record** page.
6. In the right panel labeled **Page > Visualforce**, do the following:
   a) Set the **Label** to an underscore character '_'.
   b) Make sure the **Visualforce Page Name** is set to the following:
      i. Account – **blankAccountWS**
      ii. Contact – **blankContactWS**
      iii. Opportunity – **blankOpportunityWS**
      iv. Case – **blankCaseWS**
      v. Task - **blankTaskWS**
   c) Set the **Height** to 0.
7. Click **Save** above the right panel labeled **Page > Visualforce**.
8. Click **Activate** on the **Page Saved** popup window. If the popup window doesn't appear, click the **Activate** button to the right of the **Save** button.
9. Click the **Assign as Org Default** button on the **Activation** window to activate the page as **Org Default** and Click **Save**.
10. Click the **Back** button above the **Save** button to go back to (**Account, Contact or Opportunity)** page.
11. Repeat the steps 1-10 for the objects you are using**.**

There will be a box with a "_" character shown at the bottom of the Account, Contact, Opportunity, Case, and Task page. If the user is already logged in, you may need to press the browser's refresh button to see the changes the first time you access account, contact or opportunity page.

Step 8 – Embed Recording List into User Profile

To allow the recorded user to see all her call recordings, the recording list must be added to the User Profile Page Layouts.

1. Click the **Setup** icon and select the **Setup** option.
2. In the left panel, click **Objects and Fields** and then **Object Manager**.
3. Click **User** in the list and then click **User Profile Page Layouts** in the left panel. If there is more than one page layout for the **User Profile Page Layouts**, you will need to modify each page layout that needs the **Call Recordings** related list.
4. Click the **User Profile Page Layout** link and click **Related Lists** in the list in the **User Profile Page Layout** section.
5. Click and drag **Call Recordings** to the **Related Lists** section and drop it where you want in the list.
6. Click on the **Related List Properties** icon on the **Call Recordings** tab header.
7. We suggest selecting the following fields. If you are not using an object such as **Case** or **Opportunity**, do not add that field to the selected fields.
    a) Move **Recording URL**, **Recording Date**, **Account Name, Recorded Contact, Case Number**, **Opportunity Name**, **Task Subject**, **Duration (secs)**, **Call Direction**, and **Call Type** from **Available Fields** to **Selected Fields**. For the **Sort By** settings, select **Recording Date** and **Descending**.
8. Click **OK** to save the Call Recording layout properties.
9. Scroll to the top and click **Save.**
10. Click **No** to **Overwrite Users' Related List Customizations**.

Step 9 – Create Connected App for Sandbox

This step assumes the user is logged into the Salesforce **Sandbox** system.

1. Click the **Setup** icon and select the **Setup** option.
2. On the left panel, click **Apps** and then **App Manager**.
3. Click on **New Connected App** in the upper right corner of the page.
4. Enter the following information in the Connected App page. If a setting is not mentioned, use default setting.
    a) **Connected App Name** – DVSAnalyticsEncore
    b) **API Name** – Use the generated name
    c) **Contact Email** – Support@DVSAnalytics.com
    d) **Enable OAuth Settings** - checked
    e) **Callback URL** – http://localhost/
    f) **Use digital signatures** - checked
    g) Click **Choose File** and select the **DVSAnalytics_Signed_Certificate.PEM** file provided by your DVS Installation Engineer. **Note:** The certificate generated by DVSAnalytics defaults to a 10-year expiration. If you have policies that require certificates be of shorter lengths, discuss this with your DVSAnalytics Installation Engineer.
    h) **Selected OAuth Scopes** – add:
        i. **Access and manage your data (api)**
        ii. **Perform requests on your behalf at any time (refresh_token, offline_access)**
5. Scroll to the bottom of the page and click **Save**.
6. Click **Continue** and the **DVSAnalyticsEncore** connected app screen is displayed.
7. Click **Manage**.
8. Click **Edit Policies.**
9. Click on the **Permitted Users** dropdown and select **Admin approved users are pre-authorized**.
10. Click **Save**.
11. Click **Manage Profiles** in the **Profiles** section.
12. Select **System Administrator.** If you use a user account with a different profile for the **DVSAnalyticsEncore** connected app, select the profile for that user.
13. Click **Save**.

Step 10 – Gather Information to Test from Sandbox

1. Open a new text document in Notepad.
2. Enter the Salesforce sandbox account to run the **DVSAnalyticsEncore** Connected App.
3. After logging into the Salesforce sandbox, click the **Setup** icon and select the **Setup** option.
4. On the left panel, click **Apps** and then **App Manager**.
5. Locate the **DVSAnalyticsEncore** app in the **Apps** list, click and then select **View**.
6. Copy the value of **Consumer Key**.
7. Past the value into Notepad.
8. Save the file and give it to your DVS Installation Engineer.

Step 11 – Test Encore Integration from Sandbox

The sandbox is now ready to test the Encore Salesforce integration software. Work with your DVS Installation Engineer to test the integration.

CAUTION
While testing do not make any changes to the Account, Contact, or Opportunity page layouts in your Salesforce production system. If you do make changes, you must make the same changes to the sandbox, otherwise your production changes will be lost when you deploy the change set from the sandbox.

Once you have tested the software from the sandbox and verified it is working as expected, you are ready to move to the next section to start the production deployment process.

If testing with a user that is not a Salesforce administrator, you will need to following the instructions in "Step 17 – Assign Permission Set to Users" on page 18 for all users that are used for testing.

Step 12 – Authorize a Deployment Connection

This step assumes the user is logged into the Salesforce **Production** system. Authorize inbound changes so the sandbox used for testing can send change sets to production.

1. Click the "Setup" icon and select the "Setup" option.
2. Enter **Deployment** in the **Quick Find** box, then click **Deployment Settings**.
3. Click **Edit** next to the sandbox you want to authorize.
4. Click the checkbox next to **Allow Inbound Changes**.
5. Click **Save** and log out of the production system.

Step 13 – Create the Outbound Change Set

This step assumes the user is logged into the Salesforce **Sandbox** system.

1. Click the **Setup** icon and select the **Setup** option.
2. Enter **change** in the **Quick Find** box, and then click **Outbound Change Sets**. If a tutorial window is displayed, click **Continue**.
3. Click **New** at the bottom of the **Outbound Change Sets** window.
4. Enter **DVS Integration** for the change set name and click **Save**.
5. Add the components to the outbound change set. For each item in the list, click **Add**, in the **Change Set Components** section.
    a) Select **Apex Trigger** from the **Component Type** list and select **AccountSave**, **ContactSave**, and **TaskSave**. If using the **Case** object, select **CaseSave**. If using the **Opportunity** object, select **OpportunitySave**. Click **Add To Change Set**.
    b) Select **Encore Configuration** from the **Component Type** list and select **WebAPI EndPoint**. Click **Add To Change Set**.
    c) Select **Lighting Page** from the **Component Type** list and select **Account_Record_Page, Contact_Record_Page** and **Task_Record_Page.** If using the **Case** object, select **Case_Record_Page**. If using the **Opportunity** object, select **Opportunity_Record_Page**. Click **Add To Change Set**.
    d) Select **Page Layout** from the **Component Type** list. Scroll to the bottom of the list and click **more** until you see the **User Layout**. Scroll to the top of the list and select **Account Layout**, **Contact Layout**, **Task Layout**, and **User Layout.** If using the **Case** object, select **Case Layout**. If using the **Opportunity** object, select **Opportunity Layout**. Click **Add To Change Set**.
    e) Select **Permission Set** from the **Component Type** list and select **EncoreWFO**. Click **Add To Change Set**.
    f) Select **Remote Site** from the **Component Type** list and select **EncoreWFOSystem**. Click **Add To Change Set**.
    g) Select **Visualforce Page** from the **Component Type** list and select **blankAccountWS**, **blankContactWS**, and **blankTaskWS**. If using the **Case** object, select **blankCaseWS**. If using the **Opportunity** object, select **blankOpportunityWS**. Click **Add To Change Set**.

6. Verify the list of **Change Set Components** match the following list. If you are not using Case or Opportunity, items associated with the unused object will be missing.

Action	Name	Parent Object	Type	API Name
Remove	Account Layout	Account	Page Layout	Account Layout
Remove	AccountSave	Account	Apex Trigger	AccountSave
Remove	Account_Record_Page		Lightning Page	Account_Record_Page
Remove	Case Layout	Case	Page Layout	Case Layout
Remove	CaseSave	Case	Apex Trigger	CaseSave
Remove	Case_Record_Page		Lightning Page	Case_Record_Page
Remove	Contact Layout	Contact	Page Layout	Contact Layout
Remove	ContactSave	Contact	Apex Trigger	ContactSave
Remove	Contact_Record_Page		Lightning Page	Contact_Record_Page
Remove	EncoreWFO		Permission Set	EncoreWFO
Remove	EncoreWFOSystem		Remote Site	EncoreWFOSystem
Remove	Opportunity Layout	Opportunity	Page Layout	Opportunity Layout
Remove	OpportunitySave	Opportunity	Apex Trigger	OpportunitySave
Remove	Opportunity_Record_Page		Lightning Page	Opportunity_Record_Page
Remove	Task Layout	Task	Page Layout	Task Layout
Remove	TaskSave	Task	Apex Trigger	TaskSave
Remove	Task_Record_Page		Lightning Page	Task_Record_Page
Remove	User Layout	User	Page Layout	User Layout
Remove	WebAPI_Endpoint	Encore Configuration	Encore Configuration	WebAPI_Endpoint
Remove	blankAccountWS		Visualforce Page	blankAccountWS
Remove	blankCaseWS		Visualforce Page	blankCaseWS
Remove	blankContactWS		Visualforce Page	blankContactWS
Remove	blankOpportunityWS		Visualforce Page	blankOpportunityWS
Remove	blankTaskWS		Visualforce Page	blankTaskWS

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If a component that you are using is missing, repeat step 5 to add the missing component.

7. In the **Change Set Components** section, click **View/Add Dependencies**, click the box next to **Name** at the top of the list of dependencies to select all dependencies and click **Add to Change Set**.
8. The change set is ready to upload. In the **Change Set Detail** section, click **Upload**.
9. Select the **Production** organization as the **Target Organization** and click **Upload**. You will receive an email when the upload has completed. It usually only takes about one minute.
10. Log out of the **Sandbox**.

Step 14 – Deploy Change Set

This step assumes the user is logged into the Salesforce **Production** system. You are now ready to deploy the change set to your production system. It can take several minutes until the change set is ready to deploy.

1. Click the **Setup** icon and select the **Setup** option.
2. Enter **change** in the **Quick Find** box, and then click **Inbound Change Sets**.
3. In the **Change Sets Awaiting Deployment** list, click the **DVS Integration** change set.
4. Click **Deploy**. If the Deploy button on the Deploy Change Set window is not active, the change set is not ready to deploy.
5. Select **Default** as the test option and click **Deploy**. Click **OK** to the warning message.
6. Verify the deployment is complete by clicking on the **Deployment Status** link.

Step 15 – Assign Permission Set to Current User

If you are installing an upgrade to the Encore Salesforce integration, you can skip this step. The change set contained a permission set that must be applied to the current user. This step assumes the user is logged into the Salesforce **Production** system.

1. Click the **Setup** icon and select the **Setup** option.
2. On the left panel, click **Users** and then **Users** again. Click on the current user.
3. At the top of the user page, click on the **Permission Set Assignments** link.
4. Click the **Edit Assignments** button in the **Permission Set Assignments** section.
5. Select the **EncoreWFO** permission set and add it to the Enabled Permission Sets.
6. Click the Save button and go to the Setup Home.

Step 16 – Activate Lightning Record Pages

If you are installing an upgrade to the Encore Salesforce integration, complete this step for new objects, such as **Opportunity**, **Case**, or **Task**, otherwise complete this step for each object. This step assumes the user is logged into the Salesforce **Production** system.

1. Click the **Setup** icon and select the **Setup** option.
2. In the left panel, click **User Interface** and then click **Lightning App Builder**.
3. Click **Edit** on the **Account Record Page** row.
4. Click **Activation...** and then click **Assign as Org Default** and finally click **Save**.
5. Repeat steps 3 and 4 for the **Contact Record Page.** If using the **Opportunity** Object, also repeat for the **Opportunity Record Page**.

Step 17 – Assign Permission Set to Users

If you are installing an upgrade to the Encore Salesforce integration, you can skip this step. This step assumes the user is logged into the Salesforce **Production** system.

1. Click the **Setup** icon and select the **Setup** option.
2. On the left panel, click **Users** and then **Permissions Sets**.
3. Click **EncoreWFO**.
4. Click **Manage Assignments**.
5. Click on check box for all recorded users.
6. Click **Assign**.

Step 18 – Update Users' Computer Login ID

If you are installing an upgrade to the Encore Salesforce integration, you can skip this step. For each user in Salesforce that needs to be recorded, the computer login ID field must be populated with the user's Windows Login ID.

1. Click the **Setup** icon and select the **Setup** option.
2. On the left panel, click **Users** and then **Users** in the list below **Users**.
3. For each recorded user account in the list and click **Edit**.
4. Scroll to the **Additional Information** section and enter the user's Computer Login ID.
5. Click **Save**.

Step 19 – Create Connected App for Production

This step assumes the user is logged into the Salesforce **Production** system.

1. Click the **Setup** icon and select the **Setup** option.
2. On the left panel, click **Apps** and then **App Manager**.
3. Click on **New Connected App**.
4. Enter **DVSAnalyticsEncore** in **Connected App Name**.
5. Use default value for **API Name.**
6. Enter **Support@DVSAnalytics.com** in **Contact Email**.
7. Check **Enable OAuth Settings.**
8. Enter **http://localhost/** in **Callback URL.**
9. Check **Use digital signatures** and click **Choose file**

10. Browse and select the **DVSAnalytics_Signed_Certificate.PEM** file provided by your DVS Installation Engineer.
11. Add **Access and manage your data (api)** and **Perform requests on your behalf at any time (refresh_token, offline_access)** to **Selected OAuth Scopes.**
12. Click **Save**.
13. Click **Continue.**
14. Click **Manage on** the **DVSAnalyticsEncore** app screen.
15. Click **Edit Policies.**
16. Click on the **Permitted Users** dropdown and select **Admin approved users are pre-authorized**.
17. Click **Save**.
18. Click **Manage Profiles** in the **Profiles** section.
19. Select **System Administrator.** If you use a different user account for the **DVSAnalyticsEncore** app, select the profile for that user.
20. Click **Save**.

Step 20 – Gather Information for Production System

1. Open a new text document in **Notepad**.
2. Enter the Salesforce account to run the **DVSAnalyticsEncore** Connected App.
3. After logging into Salesforce. Click the **Setup** icon and select the **Setup** option.
4. On the left panel, click **Apps** and then **App Manager**.
5. Locate the **DVSAnalyticsEncore** app in the Apps list, click and then select **View**.
6. Copy the value of **Consumer Key**.
7. Past the value into **Notepad**.
8. Save the file and give it to your DVS Installation Engineer.

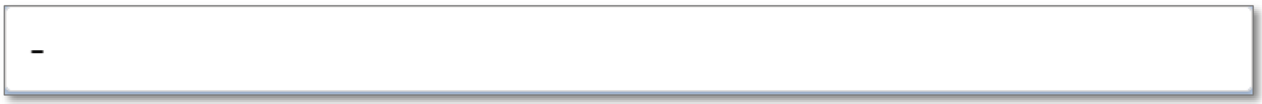
Step 21 – Validate Production System

The installation is complete, and the Salesforce production system is now ready for a final validation.

Verify you see the **Call Recordings** related list and the **Visualforce** page in the Account, Contact, Opportunity, and Case record. Opportunity and Case are optional. For example:

Call Recordings related list:

Visualforce page:



Work with your DVS Installation Engineer to test the integration is working for the recorded users.