USER MANUAL FOR CLOUDCHERRY – SF CRM INTEGRATION

Contents

1. About CloudCherry

CloudCherry is a Real-time, Omni-channel End-To-End Customer Experience Management platform that lets brands track, measure & improve Customer Delight - thereby increasing profitability, reducing customer churn and improving loyalty.

The SaaS product is the perfect tool for Feedback collection, Customer Experience Management and Customer Experience Measurement for SMBs and enterprises.

One of the key aspects to improving Customer Experience is closing the Loop with Customers when they face an issue. Through the integration between Salesforce's ticketing module and CloudCherry, every customer issue provided in the form of feedback can be automatically raised as a ticket in Salesforce and can be tracked, managed and closed effectively.

The app handles the following:

- Set up notifications in CloudCherry and Create and maintain the relation with Salesforce
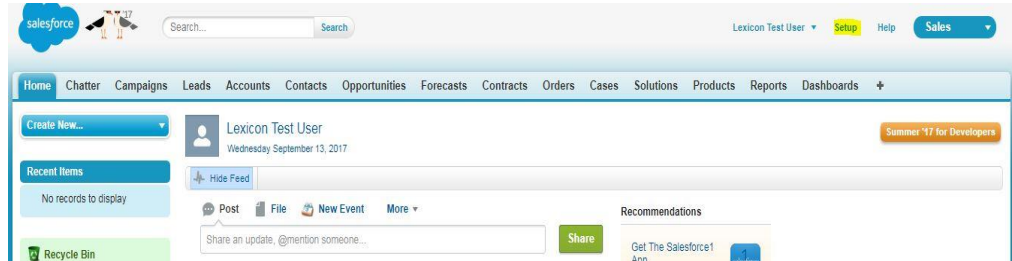- Update data on your CloudCherry (CEM) platform whenever any action is taken.
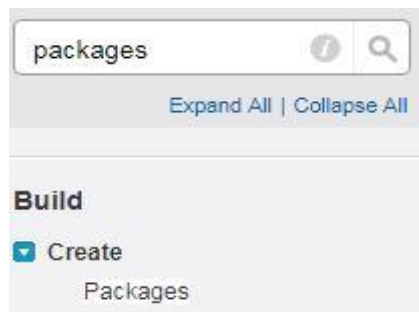
2. Workflow
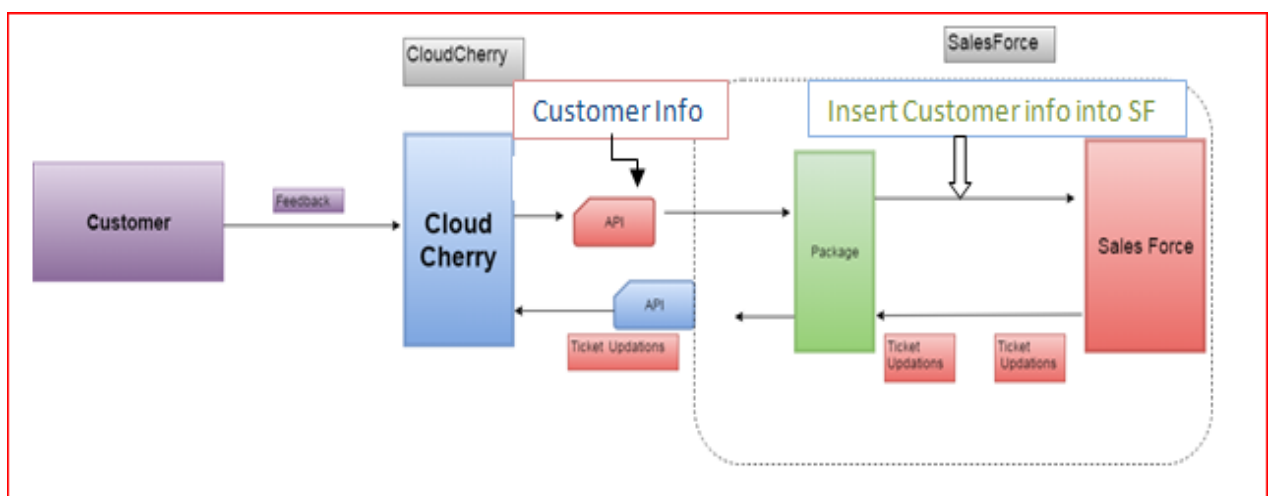
3. Installation

3.1 Uploading the managed package

3.1.1   Login to Salesforce product with "**Admin**" role where the entire **"Cloudcherry phase2"** package is available and click on **"Setup".**

3.1.2   Search for **"Package"** in the searchbox and select **packages** frpm the search result.

3.1.3 **"Managed package"** will be displayed and select **"CloudCherry Phase2"** as shown below and Click on **upload**.

3.1.3   Enter version details and click on **Upload**.

3.1.4 O successful uploading, system will generate URL for installing package in SF org.

3.2 Steps for installing package

3.2.1   Login to the account in which user want to install the package.

3.2.2   Copy the installation URL that is generated while uploading the package and paste in a new window.

3.2.3   This will ask for a package installation.

3.2.4   Select required option and click on install.

3.2.5   Select any one option to give the privileges to the users.

Note: *As this application contains lightening components, Users should have "Domain" for installing the package. While installing the package if there is no domain, then system will ask for the creation a Domain. Please follow steps provided in Section 4.to create a Domain.*
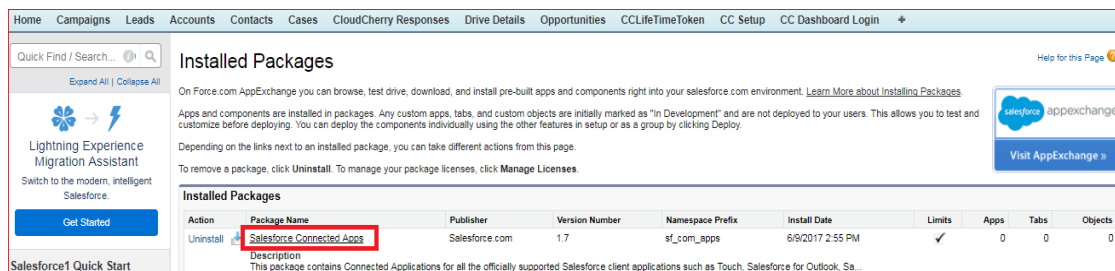

3.1.5   Once the app is installed, you will see the installed package for CloudCherry.
   ➢ Click on "**Setup**" button on top right corner of the salesforce home screen.
   ➢ Search **"install package"** in search box on left of the salesforce Setup screen.
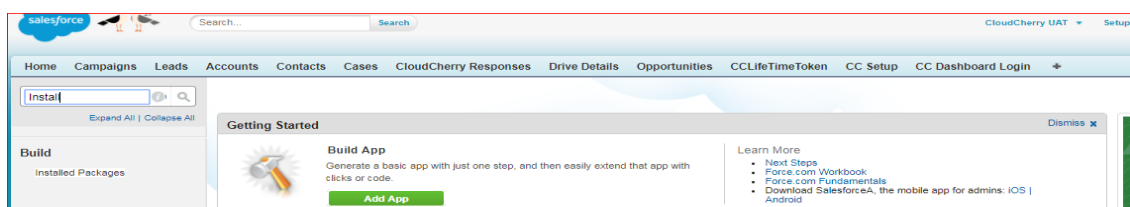
   ➢ Click on **"Installed package"** from search result

3.1.6 After Installation, Admin / User need to complete the following steps. (This is optional; however, we suggest that you do it since the "CC Ticket" Field needs to be non-editable for agents /sub-users

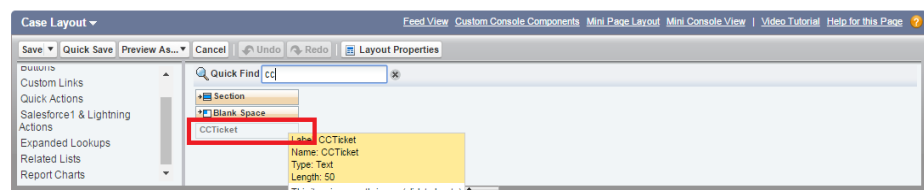1. Making the "**CCTicket**" Field as "**Non-Editable**" for the non-administrator users.
   - ➢ Search for "**Page Layouts**" in the search box of **SETUP**.
   - ➢ Click on "**Cases**" >> **Page Layouts**
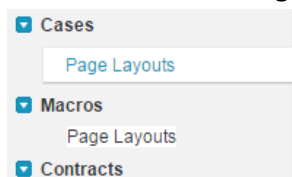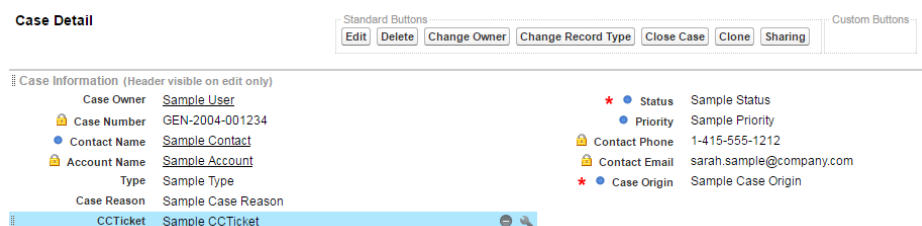

   - ➢ Click on "**EDIT**"
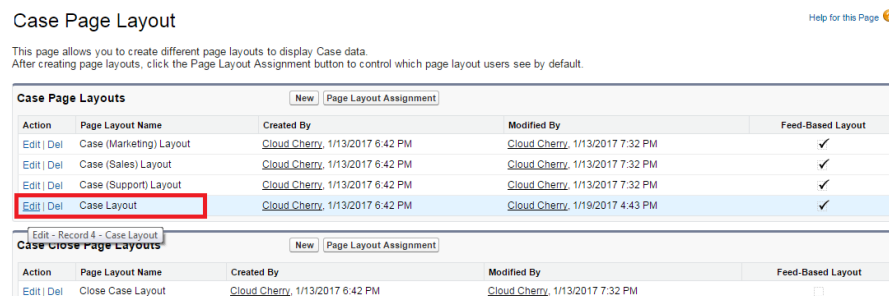

   - ➢ Search for "**CCTicket**" field by using Quick Search, system will automatically navigate to the position of that field.

   - ➢ Once you are navigated, search for the **"CCTicket"** field and click on it for making modifications / update field details i.e., to make it as **"Read only / non-editable"** field for Agents.

➢ Once you select **"CCTicket"** a popup will be displayed on your screen, as shown below. Check "Read-Only" checkbox and click "OK".
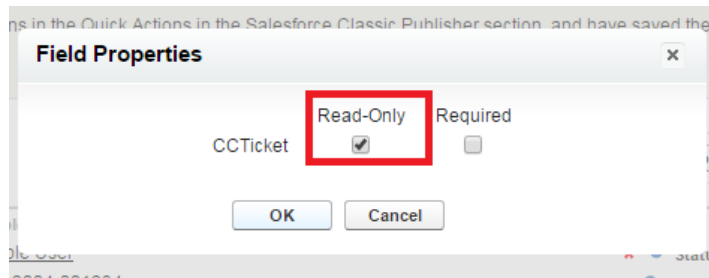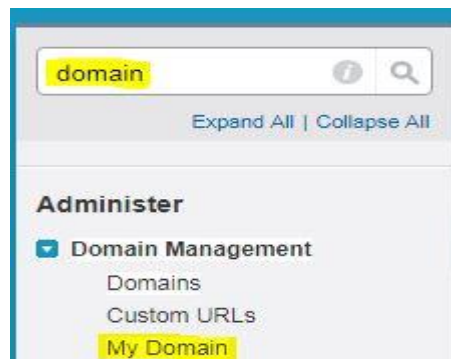
Note: All the fields of Cloudcherry objects (i.e. Campaigns, Leads, Accounts, Contacts, Cases, Opportunities) need to be added manually from respective page layouts.

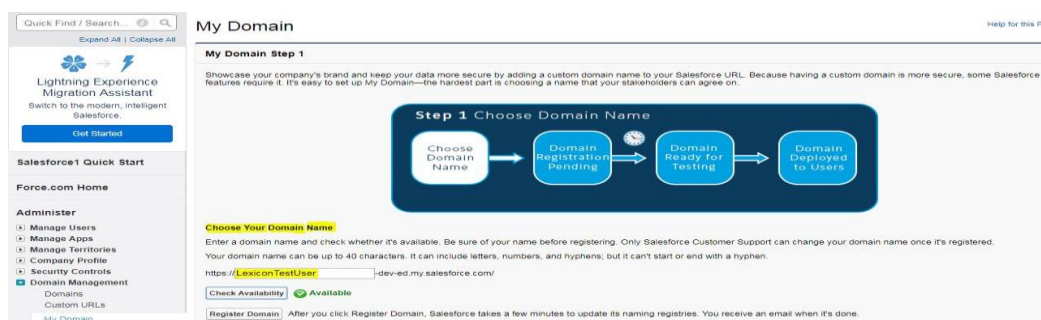## 4. Step for creating Domain (If Domain is not available)

4.1 Go to "**Setup"** and search for **Domain**.

4.2 Select **"My Domain".**

4.3 Enter domain name in the **"Domain Name"** textbox.

4.4 Click on **"Check availability"** to navigate to Step 2.

4.5 System will send a Domain confirmation Email to the respective email address.

4.6 Once the confirmation email is received, either select the link from the email or refresh the "My Domain" screen in SF Org.
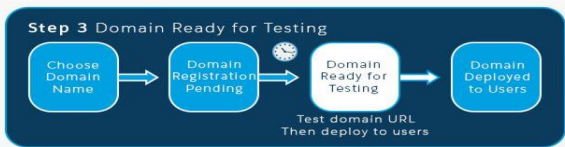
4.7 Click on **"Deploy Users"** to append the Domain for all the Users in the SF Org.

5. Establishing connection between Salesforce and Cloudcherry:

5.1 Click on **"CC Setup"** tab from menu bar, this will direct user to the following screen.

5.2 To get "**CC Life Time Token"** from CC, click on **"Get CC Token"** link and this will navigate user to following screen
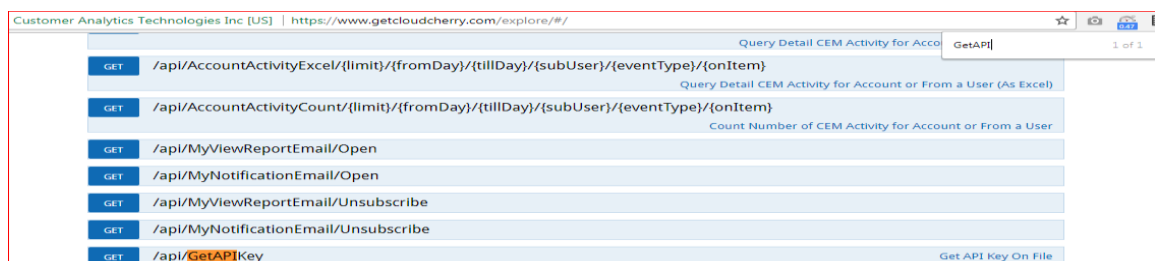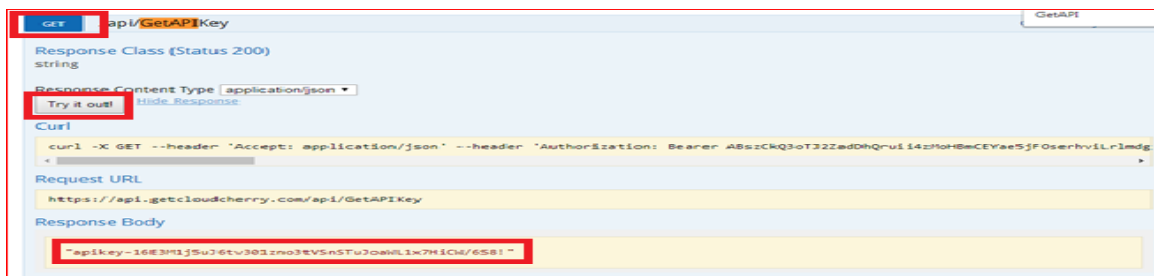

5.3 Enter **"Username"** and **"Password"** in the textbox provided and click on **"Get API token"**

5.4 Click on **"Show/Hide"** for CloudAPI

5.5 Search for **GetAPI key**, as shown in below screen to find the GetAPI key link

E. Select "**GET**" and click on **"Try it out** to get the CC Life Time Token.

5.6 Enter the **"CC User Name"** and **"CC Life Time Token"** (the Permanent API Key given by CloudCherry) and Click on **"Connect To CC".** Following screen will be displayed
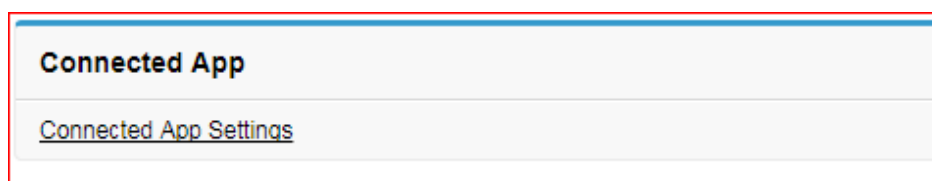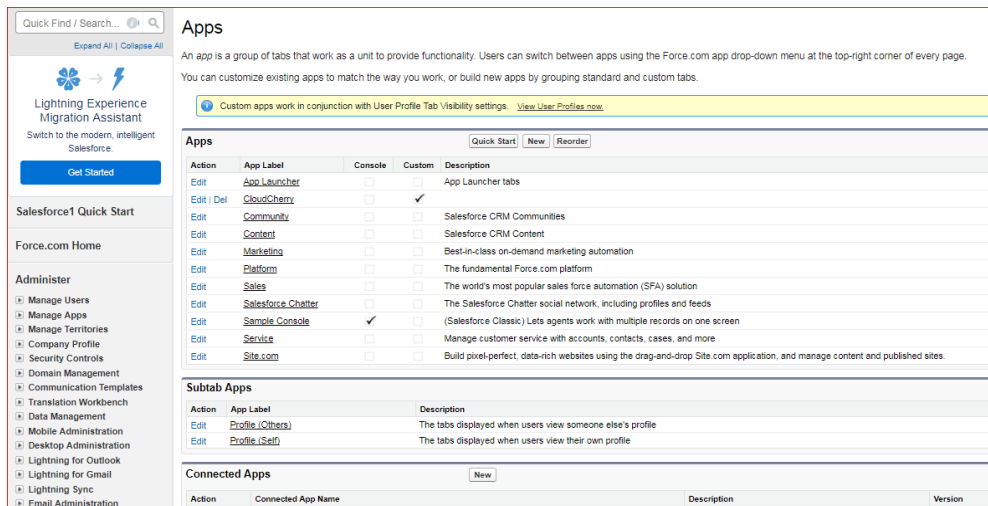
6. Establishing connection between Cloudcherry and Salesforce:

To establish a connection between Cloudcherry to Salesforce user needs to create a connected app in salesforce org.
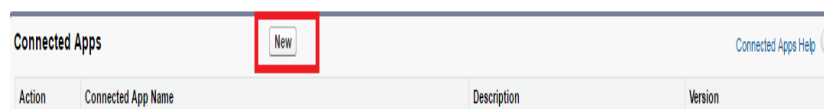
6.1   Steps to create Connected App:

6.1.1   By clicking on "**Connected App settings**" link user will navigate to **Apps page** in salesforce.

6.2 Creating a "Connected APP" in Salesforce for generating "Client ID" and "Secret Key".

6.2.1   In "**CONNECTED APPS**" section, click on "**New**" button to create a connected app in Salesforce for CloudCherry.

6.2.2   On clicking **"New"** the following screen will appear.

6.2.3   Enter a name in the Connected App textbox. [The API Name will be populated automatically on entering the APP Name.]

6.2.4   Provide the Email ID and other mandatory information.

6.2.5   Check **"Enable OAuth Settings"** checkbox in **API** Section.

6.2.6   On checking the enable **"OAuth"** settings checkbox, you will see the following screen.

6.2.7   Enter the "CallBack URL" given by CloudCherry along with the CloudCherry Permanent API Key. Ex: https://xxxxxxx.com?ccAccessToken=xxxxxx

6.2.8   In the "Selected OAuth Scopes" section, select following

    a)   Full Access

    b)   Perform requests on your behalf at any time (refresh token, offline access).

6.2.9   Click on **"SAVE".** Following screen will be displayed.

*Please note that **"CONSUMER KEY"** and **"CONSUMER SECRET"** are generated automatically.*

6.2.10   Now, Type **"apps"** in the search box on top left corner of the page.

6.2.11   Select "**Connected Apps"** from the search result.
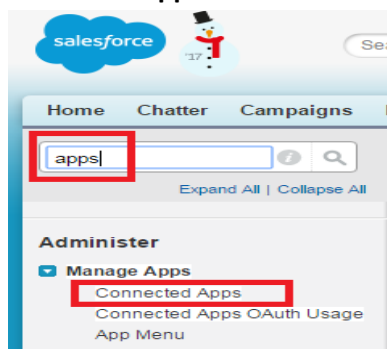
6.2.12   This will display all the existing connected apps.

6.2.13   Click on the "Edit" link of the app which was created earlier to edit app details.

Note: Please ensure that the inputs for this screen are, as follows:

Input for the "Expire Refresh Token "can be given according to the requirement.

6.2.14   "**Consumer Key**" and "**Consumer Secret**" that are generated in Salesforce should be entered in CC settings screen as "**Client id**" and "**Secret key**", to establish a connection between CloudCherry and Salesforce as shown below.

On successful establishment of connectivity between Cloudcherry and Salesforce, objects will function as per the configuration settings.