



USER MANUAL FOR CLOUDCHERRY – SF CRM INTEGRATION

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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.

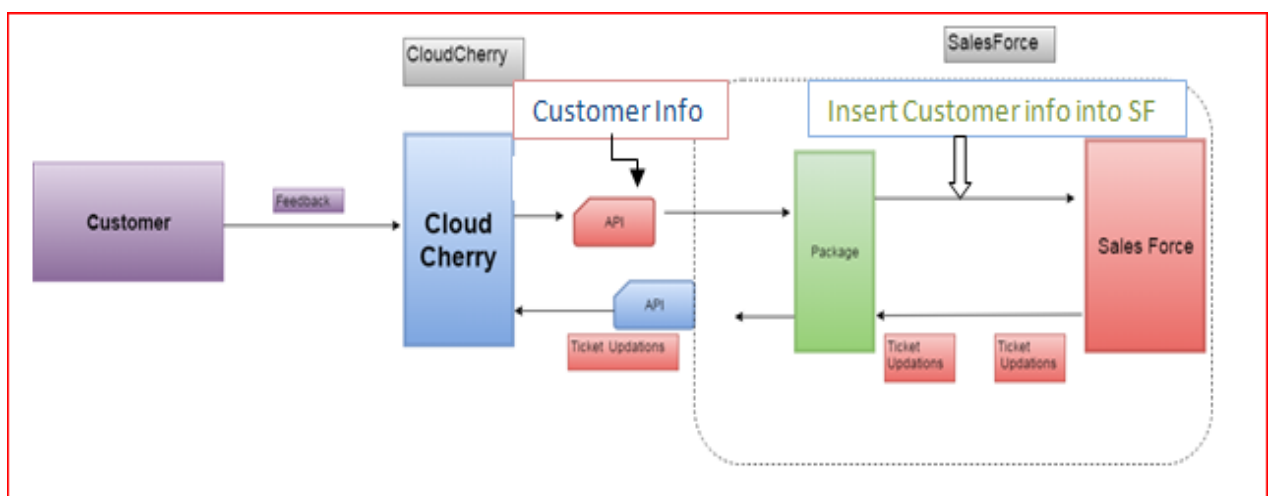
The SaaS product is the perfect tool for Feedback collection, Customer Experience Management and Customer Experience Measurement for SMBs and enterprises.

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.

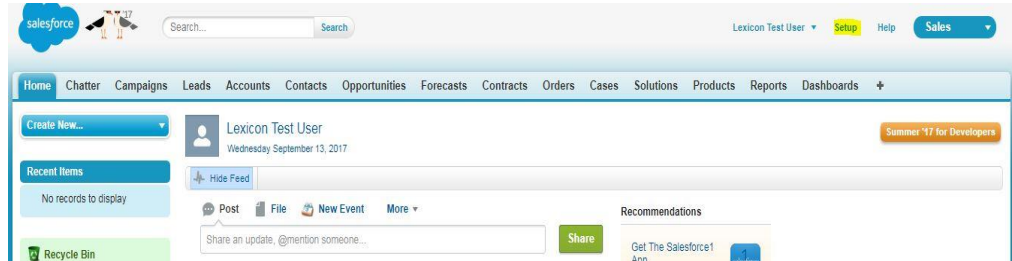
2. Workflow



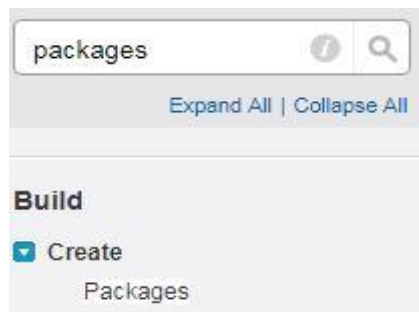
3. Installation

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** from the search result.



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

Packages

Developer Settings

Your current developer settings are listed below. These settings determine the types of packages you can create and upload.

Package Types Allowed	Managed and Unmanaged	Your organization is configured to contain one managed package and an unlimited number of unmanaged packages. Only managed packages can be upgraded.
Managed Package	CloudCherry Phase 2	You have selected the following as the only managed package for this salesforce.com organization: CloudCherry Phase 2
Namespace Prefix	CCUAT	Salesforce.com prepends this prefix (along with two underscores, “_”) to components that need to be unique such as custom objects and fields.

Packages

A package contains components such as apps, objects, reports, or email templates. These packages can be uploaded to share with others privately or posted on Force.com AppExchange to share publicly. The list below displays all packages created by your organization. To create a new package, click New.

Action	Package Name	Description
Edit	CloudCherry Phase 2	

Package CloudCherry Phase 2

Back to Package List

Package Detail

Package Name	CloudCherry Phase 2	Type	Managed
Language	English		
Notify on Apex Error	CloudCherry UAT	Post Install Script	
Namespace	CCUAT	Uninstall Script	
Created By	CloudCherry UAT, 8/10/2017 5:00 PM	Last Modified By	CloudCherry UAT, 9/13/2017 4:38 PM
Description			

Components

Action	Name	Parent Object	Type	Included By	Available in Versions	Owned By
	Account	CloudCherry Response	Custom Field	CloudCherry_Response	1.0 - Current	
Remove	AccountID	Case	Custom Field	User Selected	1.0 - Current	
Remove	AccountUpdateTrigger_Test	Account	Apex Class	User Selected	1.0 - Current	
Remove	Active	CloudCherry Response	Custom Field	User Selected	1.0 - Current	
	All	CloudCherry Response	List View	CloudCherry_Response	1.0 - Current	
Remove	Average Account Balance	Case	Custom Field	User Selected	1.0 - Current	
Remove	Average Case Score	Account	Custom Field	User Selected	1.0 - Current	

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

Package Version

CloudCherry Phase 2, Version 1.0

Help for this Page

[Back to Package](#)



Uploading Version 1.0...

Running Apex test 1 of 19

Version Detail

Package Name	CloudCherry Phase 2	Uploaded By	CloudCherry UAT, 9/13/2017 5:27 PM
Version Name	testing2	Post Install Script	
Version Number	1.0	Uninstall Script	
Description		Password Protected	<input type="checkbox"/>

Package Version

CloudCherry Phase 2, Version 1.0

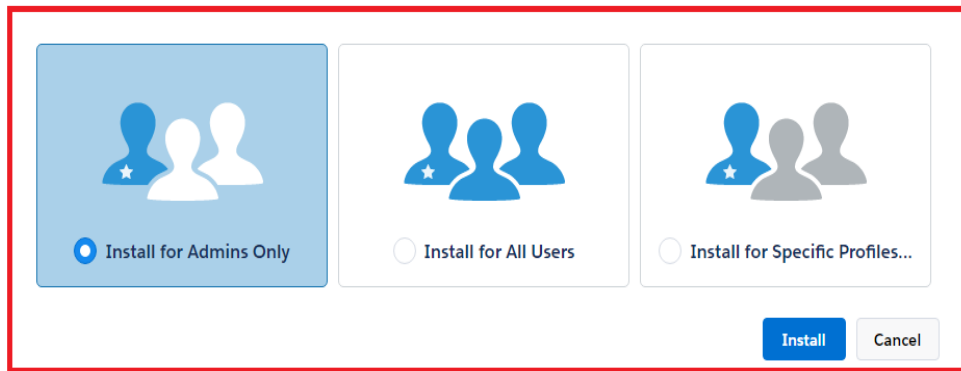
Help for this Page

Upload Complete

Your package is now available for install using the installation URL below. To publish on [AppExchange](#), log on with your publisher login to access your public listings.

Version Detail

	Deprecate
Package Name	CloudCherry Phase 2
Version Name	testing2
Version Number	1.0 (Beta 2)
Description	<div style="display: flex; justify-content: space-between; align-items: center;"> <div>Uploaded By</div> <div>CloudCherry UAT, 9/13/2017 5:27 PM</div> </div>
	<div style="display: flex; justify-content: space-between; align-items: center;"> <div>Post Install Script</div> <div>Uninstall Script</div> </div>
	<div style="display: flex; justify-content: space-between; align-items: center;"> <div>Password Protected</div> <div><input type="checkbox"/> [Change Password]</div> </div>
Installation URL	https://login.salesforce.com/packaging/installPackage.apexp?p0=04t7F000000s0AA

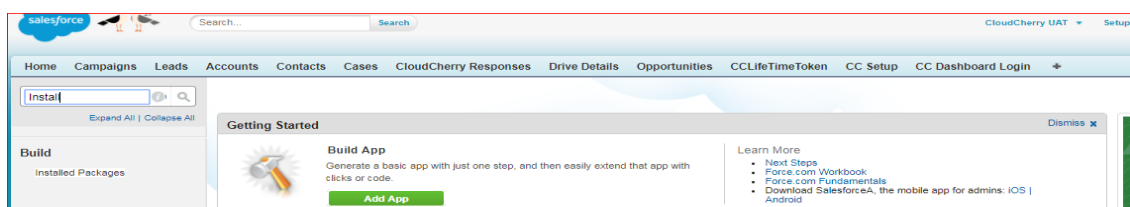


Note: As this application contains lightening components, Users should have “Domain” for installing the package. While installing the package if there is no domain, then system will ask for the creation a Domain. Please follow steps provided in Section 4.to create a Domain.

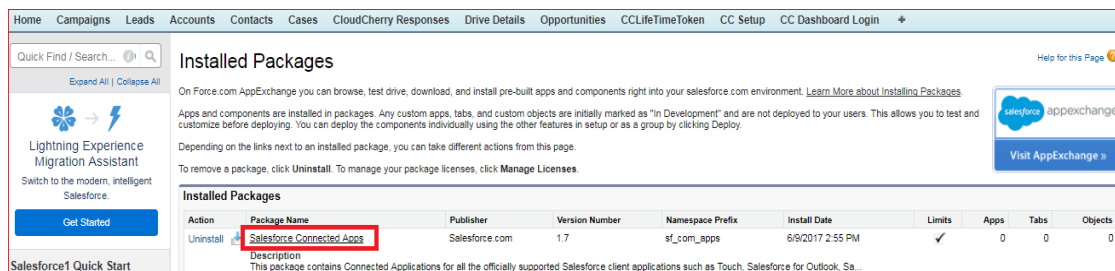


3.1.5 Once the app is installed, you will see the installed package for CloudCherry.

- 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.



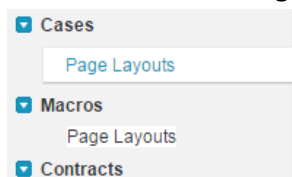
- Click on “**Installed package**” from search result



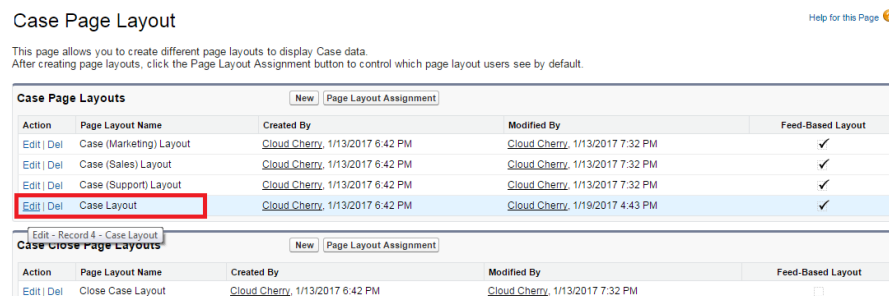
3.1.6 After Installation, Admin / User need to complete the following steps. (This is optional; however, we suggest that you do it since the “CC Ticket” Field needs to be non-editable for agents /sub-users

1. Making the “CCTicket” Field as “Non-Editable” for the non-administrator users.

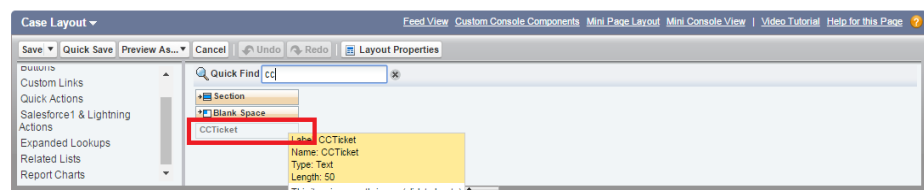
- Search for “Page Layouts” in the search box of **SETUP**.
- Click on “Cases” >> Page Layouts



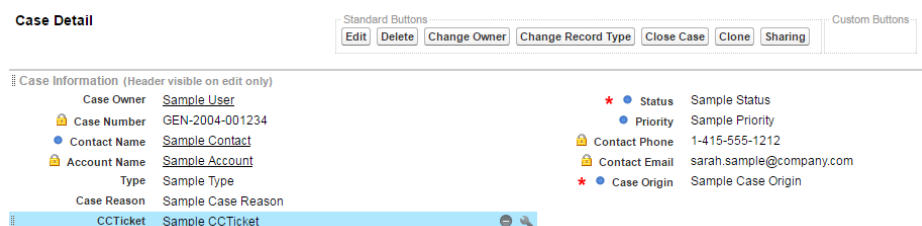
- Click on “EDIT”



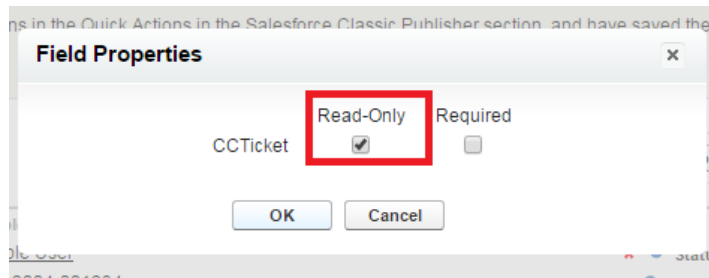
- Search for “CCTicket” field by using Quick Search, system will automatically navigate to the position of that field.



- 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”.

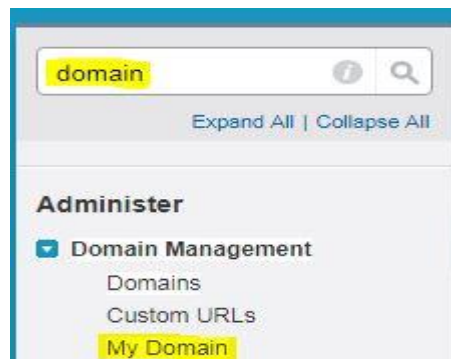


Note: All the fields of Cloudcherry objects (i.e. Campaigns, Leads, Accounts, Contacts, Cases, Opportunities) need to be added manually from respective page layouts.

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

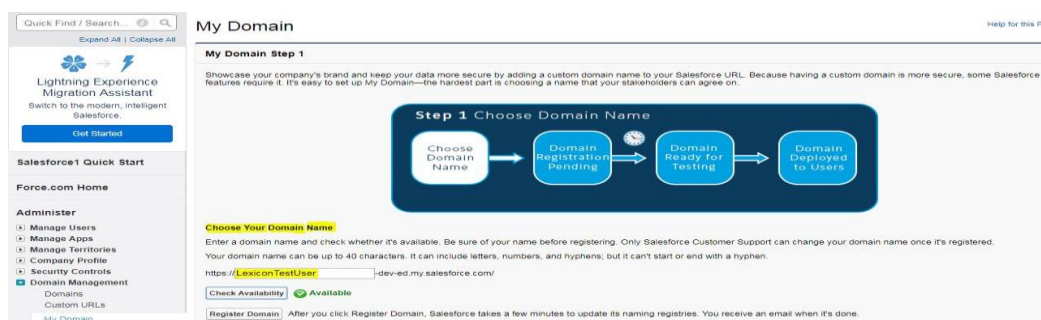
4.1 Go to “Setup” and search for **Domain**.

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.

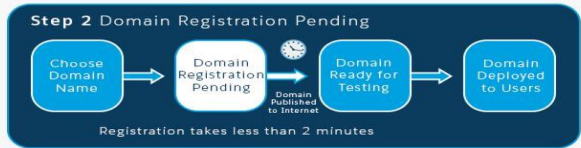
My Domain

Help for this Page

My Domain Step 2

Showcase your company's brand and keep your data more secure by adding a custom domain name to your Salesforce URL. Because having a custom domain is more secure, some Salesforce features require it. It's easy to set up My Domain—the hardest part is choosing a name that your stakeholders can agree on.

Step 2 Domain Registration Pending



Your domain name is **lexicontestuser-dev-ed.my.salesforce.com**

1 Registering your domain. You'll receive an email when it's ready for testing.

Salesforce domain ready for testing Inbox x

support@salesforce.com <support@salesforce.com> 10:34 AM (4 minutes ago) ☆

to me

Your Salesforce domain lexicontestuser-dev-ed.my.salesforce.com is ready for testing.

To log in and test it, go to <https://lexicontestuser-dev-ed.my.salesforce.com>

After testing, you can deploy your domain to your users by going to My Domain in Setup.

4.6 Once the confirmation email is received, either select the link from the email or refresh the “My Domain” screen in SF Org.

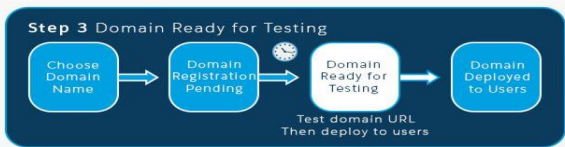
4.7 Click on “**Deploy Users**” to append the Domain for all the Users in the SF Org.

My Domain

My Domain Step 3

Showcase your company's brand and keep your data more secure by adding a custom domain name to your Salesforce URL. Because having a custom domain is more secure, some Salesforce features require it. It's easy to set up My Domain—the hardest part is choosing a name that your stakeholders can agree on.

Step 3 Domain Ready for Testing



Your domain name is **lexicontestuser-dev-ed.my.salesforce.com**

Your domain name is ready. Log in to test it out. [Log In](#)

To test your new domain, click tabs and links. If you've customized the UI, check for hard links to your original URL.

Deploy to Users Roll out the new domain to your org. Links are now redirected to your domain URL. ⓘ

Secure | <https://lexicontestuser-dev-ed.my.salesforce.com/domainname/DomainName.aspx>

Are you sure you want to deploy this domain?

After you deploy your domain, it's activated immediately and requests with the original URL are redirected to lexicontestuser-dev-ed. Only Salesforce Customer Support can disable or change your domain name once deployed.

OK **Cancel**

Your domain name is **lexicontestuser-dev-ed.my.salesforce.com**

Your domain name is ready. Log in to test it out. [Log In](#)

To test your new domain, click tabs and links. If you've customized the UI, check for hard links to your original URL.

Deploy to Users Roll out the new domain to your org. Links are now redirected to your domain URL. ⓘ

My Domain Step 4

Showcase your company's brand and keep your data more secure by adding a custom domain name to your Salesforce URL. Because having a custom domain is more secure, some Salesforce features require it. It's easy to set up My Domain—the hardest part is choosing a name that your stakeholders can agree on.

Step 4 Domain Deployed to Users



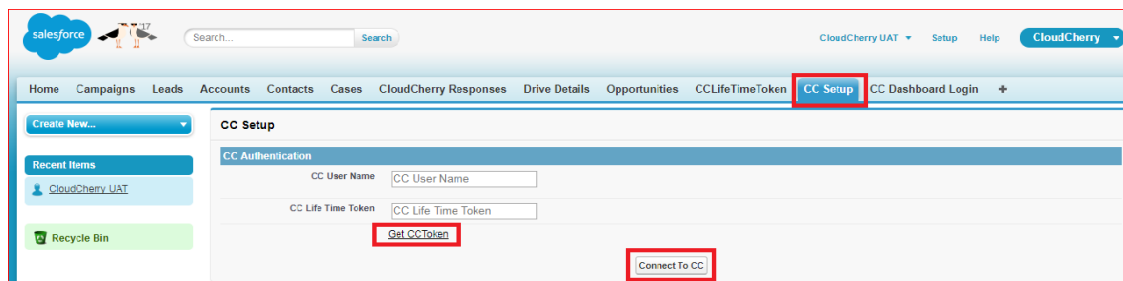
Your domain name is **lexicontestuser-dev-ed.my.salesforce.com**

My Domain Settings [Edit](#)

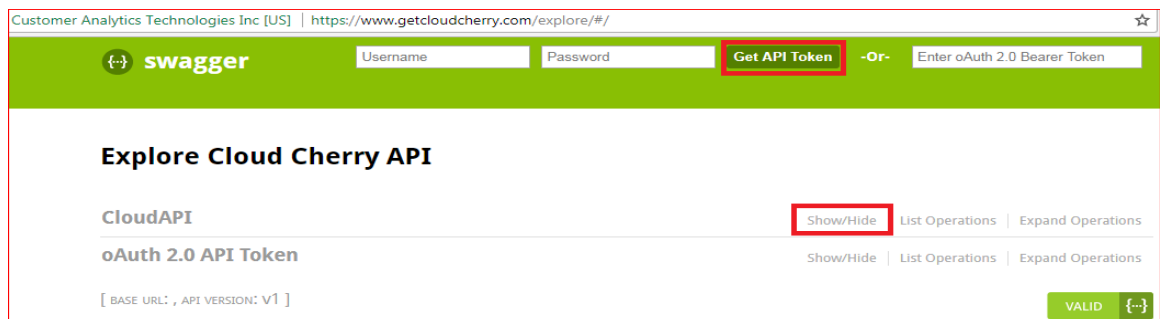
Login Policy	<input type="checkbox"/> Prevent login from https://login.salesforce.com
Redirect Policy	Page requests that don't use the new domain name, such as old bookmarks using the instance name, are: Redirected to the same page within the domain
Your domain name is	lexicontestuser-dev-ed Edit

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.



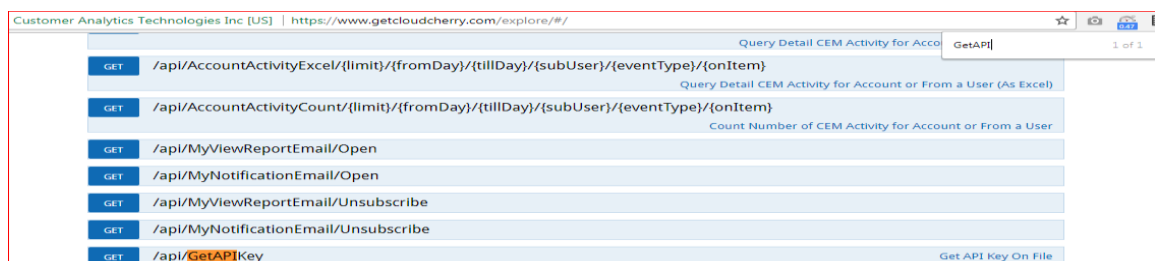
5.2 To get **“cc Life Time Token”** from CC, click on **“Get CC Token”** link and this will navigate user to following screen



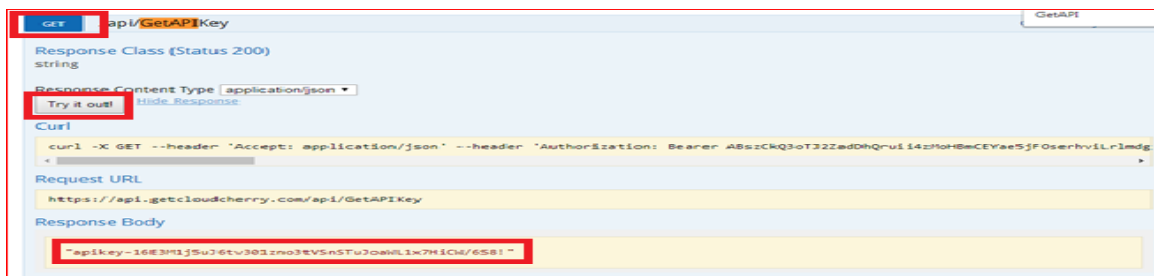
5.3 Enter **“Username”** and **“Password”** in the textbox provided and click on **“Get API token”**

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

CC Setup

CC Authentication

CC User Name

CC Life Time Token

Connect To CC

Email Configuration For Campaign, Lead, Opportunity and Case
[Help ?](#)

Select Object

New Delete

Email Configuration Settings on Campaign were not defined

Email Configuration For Account and Contact
[Help ?](#)

Select Object

New Delete

Email Configuration Settings on Account were not defined

Email Configuration For Custom Objects
[Help ?](#)

Custom Object

New Delete

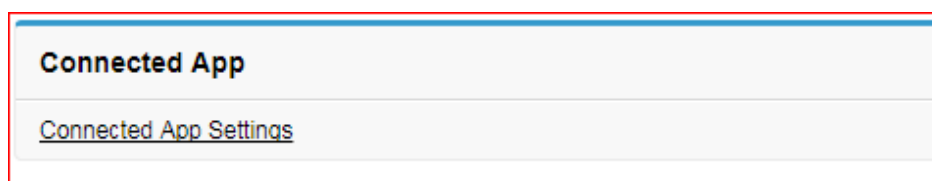
Connected App
[Connected App Settings](#)

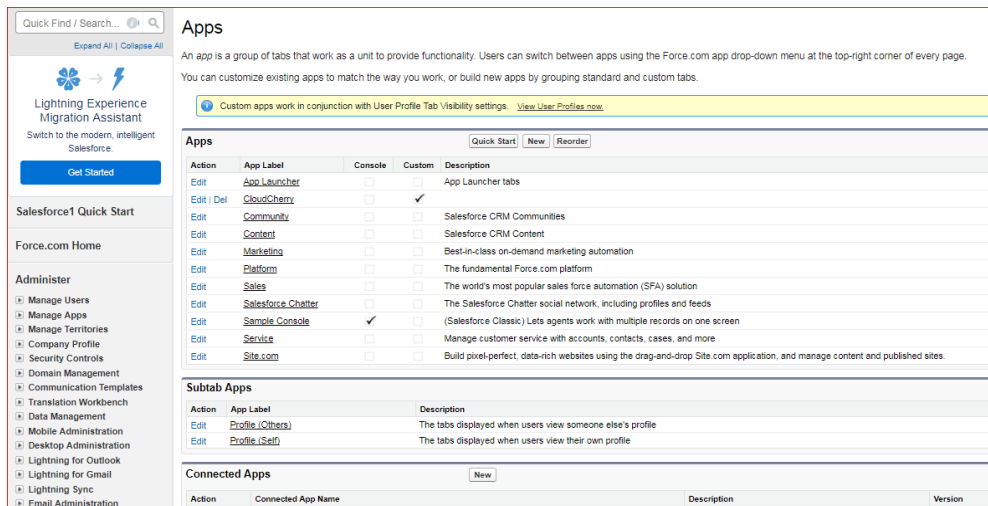
6. Establishing connection between Cloudcherry and Salesforce:

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:

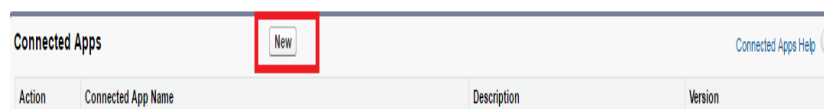
6.1.1 By clicking on **“Connected App settings”** link user will navigate to **Apps page** in salesforce.





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.

New Connected App Help for this Page ?

Save Cancel

To publish an app, you need to have chosen a namespace prefix. [Click here to choose a namespace prefix.](#)

Basic Information

Connected App Name

API Name

Contact Email

Contact Phone

Logo Image URL Upload logo image or Choose one of our sample logos

Icon URL Choose one of our sample logos

Info URL

Description

API (Enable OAuth Settings)

Enable OAuth Settings ☐

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.

API (Enable OAuth Settings)

Enable OAuth Settings ☒

Callback URL

Use digital signatures ☐

Choose file No file chosen

Selected OAuth Scopes

Available OAuth Scopes

- Access and manage your Chatter data (chatter_api)
- Access and manage your Wave data (wave_api)
- Access and manage your data (api)
- Access custom permissions (custom_permissions)
- Access your basic information (id, profile, email, address, phone)
- Allow access to your unique identifier (openid)
- Full access (full)
- Perform requests on your behalf at any time (refresh_token, offline_access)
- Provide access to custom applications (visualforce)
- Provide access to your data via the Web (web)

Add

Remove

Selected OAuth Scopes

Include ID Token ☐

- 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
- Full Access
 - 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.

Connected App Name

Back to List: Custom Apps

Edit Delete Manage

Version 1.0

API Name

Created Date 11/7/2016 6:58 PM

By:

Contact Email

Contact Phone

Last Modified Date

Description

Info URL

API (Enable OAuth Settings)

Consumer Key 3MVG9ZL0ppGP5UrBGuX1tmVYIS37PFc7YQF3bRLGt_S_WrEWgVIMLopXyDxi9kHhXae5TnyZIMxOpEmi4Ot

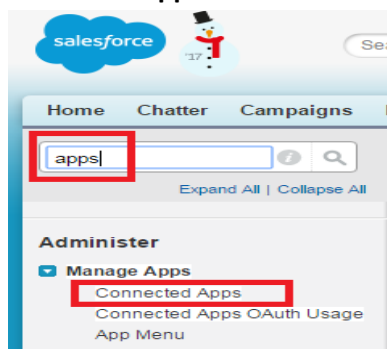
Consumer Secret 1713101981953542741

Selected OAuth Scopes Full access (full)

Perform requests on your behalf at any time (refresh_token, offline_access)

Callback URL

- 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.

Connected Apps

Help for this Page

Manage the apps that connect to your Salesforce organization.

App Access Settings

Edit

☒ Allow users to install canvas personal apps

View: All [Create New View](#)

Action	Master Label	Application Version	Permitted Users
Edit		5.0	All users may self-authorize
Edit		1.0	All users may self-authorize
Edit		1.0	All users may self-authorize
Edit		12.0	All users may self-authorize

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.

Basic Information

Start URL

Mobile Start URL

OAuth policies

Permitted Users

All users may self-authorize

IP Relaxation

Relax IP restrictions

Refresh token is valid until revoked

Immediately expire refresh token

Expire refresh token if not used for

Month(s)

Expire refresh token after

Month(s)

Session Policies

Timeout Value

High assurance session required

Custom Connected App Handler

Apex Plugin Class

Run As

User Provisioning Settings

Enable User Provisioning

Save

Cancel

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.

Integrations

Freshdesk

MailChimp

KooKoo

CISCO

Exotel

Custom SMTP

Capillary

Sales force

Zendesk

CLIENT ID

3MVG9d8.z.hDcPLs5S1bJj6Nr6w.w0E

SECRET KEY

3185449470918432165

Enable

SALES FORCE

SalesForce is a cloud based CRM system that also enables loop closure with customers using the ticketing system that is a part of the Salesforce Service cloud.

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

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