

eGain 11

For Salesforce—Updated February 2015

Configuration Guide



eGain® 11 for Salesforce Configuration Guide, February 9, 2015

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Preface

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Welcome to **eGain® 11**—the leading cloud solution for omnichannel customer engagement. Powered by a unified platform, knowledge and analytics, eGain 11 helps improve customer experience, optimize service process and grow sales across the web, mobile, social, and phone channels.

About This Guide

eGain 11 for Salesforce Configuration Guide is intended for engineers and other technical personnel responsible for planning, deploying, and configuring the eGain 11 integration with Salesforce Service Cloud. This guide discusses the various steps necessary to configure and install Salesforce and eGain for integration.

This guide was updated to include the Salesforce interface changes as of June 2014. Any changes to the Salesforce CRM and its interface are not governed by eGain and therefore may not have been added to this guide. Please consult your Salesforce administrator for configuration assistance in the event that the steps outlined in this guide differ from what is available in the Salesforce user interface.

Document Conventions

This guide uses the following typographical conventions.

Convention	Indicates
<i>Italic</i>	Emphasis, or the title of a published document.
Bold	An item in the user interface, such as a window, button, or tab.
Bold Red	A new term or phrase. Or, an important concept.
Monospace	A file name or command.
<i>Script</i>	A variable, which is a placeholder for user-specific text provided by the user. Or, text that must be typed by the user.


Document conventions

Other Learning Resources

Various learning tools are available within the product, as well as on the product CD and our website. You can also request formal end-user or technical training from eGain Education Services.

Online Help

The product includes topic-based as well as context-sensitive help.

Use	To view
 Help button	All topics in the online help; the Help button appears in the console toolbar on every screen, as well as on most windows.
F1 keypad button	Context-sensitive information about the item selected on the screen.

Document Set

The document set can be found in the `Documentation` folder on the application CD. It contains the following documents:

- ▶ *eGain 11 Release Notes*
- ▶ *eGain 11 System Requirements (Windows)*
- ▶ *eGain 11 System Requirements (Linux)*
- ▶ *eGain 11 Browser Settings Guide*
- ▶ *eGain 11 Installation Guide (Windows-JBoss)*
- ▶ *eGain 11 Installation Guide (Windows-WebLogic)*
- ▶ *eGain 11 Installation Guide (Linux-JBoss)*
- ▶ *eGain 11 Installation Guide (Linux-WebLogic)*
- ▶ *eGain 11 Upgrade Guide (From 9.0 JBoss)*
- ▶ *eGain 11 Upgrade Guide (From 9.0 WebLogic)*
- ▶ *eGain 11 Upgrade Guide (From 10.0 JBoss)*
- ▶ *eGain 11 Deployment Guide*

User's Guides for Interaction Consoles

- ▶ *eGain 11 Agent's Guide*
- ▶ *eGain 11 Social Media Manager's Guide*
- ▶ *eGain 11 Community Manager's Guide*

User's Guides for Authoring Consoles

- ▶ *eGain 11 Author's Guide to Knowledge Base*
- ▶ *eGain 11 Author's Guide to Knowledge Portals*
- ▶ *eGain 11 Author's Guide to Guided Help*
- ▶ *eGain 11 Author's Guide to Chatbot School*

User's Guides for Management Consoles

- ▶ *eGain 11 Supervisor's Guide*
- ▶ *eGain 11 Administrator's Guide to Administration Console*
- ▶ *eGain 11 Administrator's Guide to Chat and Collaboration Resources*
- ▶ *eGain 11 Administrator's Guide to Email Resources*
- ▶ *eGain 11 Administrator's Guide to Routing and Workflows*
- ▶ *eGain 11 Administrator's Guide to Data Adapters*
- ▶ *eGain 11 Administrator's Guide to Offers Console*
- ▶ *eGain 11 Administrator's Guide to Reports Console*
- ▶ *eGain 11 Administrator's Guide to System Console*
- ▶ *eGain 11 Administrator's Guide to Tools Console*
- ▶ *eGain 11 Administrator's Guide to Chatbot*

eGain Education Services

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1 Basics

- ▶ [Integration Architecture](#)
- ▶ [Information Flow](#)
- ▶ [Prerequisites](#)

With eGain Knowledge integration, knowledge portals are available to Salesforce agents to help them complete service requests easily and efficiently.

eGain Chat integration ensures that agents working in the eGain 11 Agent Console are able to view a customers' information and case history from Salesforce. The chat transcripts from interactions with customers are posted to the Salesforce CRM for future reference.

This chapter describes how eGain 11 integrates with the Salesforce Service Cloud.

Integration Architecture

How Does eGain Communicate With Salesforce?

eGain uses the Connector Architecture to integrate its knowledge management solutions with external CRM applications. All communication from eGain to external CRM applications takes place using these connectors.

Data can be passed from eGain to external applications using Web Services, JDBC, HTTP or any other interfaces exposed by the external CRM applications. Salesforce provides the SOAP Web Services interface to allow third party applications like eGain to communicate with it.

An eGain-Salesforce connector is built to communicate with Salesforce using this SOAP Web Services interface. For example, the connector allows eGain to create cases in Salesforce, and link articles from eGain as solutions for resolving cases in Salesforce.

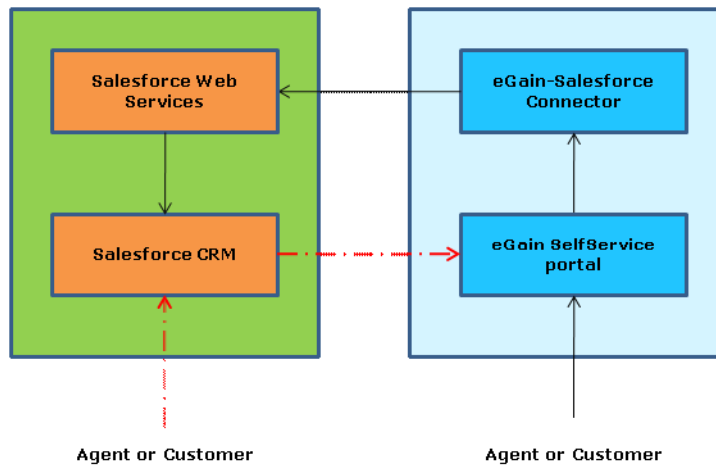
How Does Salesforce Communicate With eGain?

eGain allows external applications to pass in data in HTTPS requests. This data can be used to run a search or to start a guided help session in eGain. The data is also associated with the self-service session in eGain so that it can be subsequently used for Analytics, or for viewing details of a user's interaction with eGain.

Salesforce provides the ability to add custom buttons, links, and tabs in screens. For example, a Search button can be added to the Salesforce Case Details screen, and the button can be configured to invoke a search in eGain. Relevant fields of cases such as subject, description, and product can be passed in the HTTPS URL, which invokes a search in eGain. The values of these fields are used to search the content in the knowledge base.

Architecture Diagram

All the communication from eGain to Salesforce is done through the eGain-Salesforce Connector. Salesforce CRM communicates with eGain using the HTTPS URLs for invoking various operations, such as search, guided help, etc. in eGain. The following diagram illustrates the integration architecture:

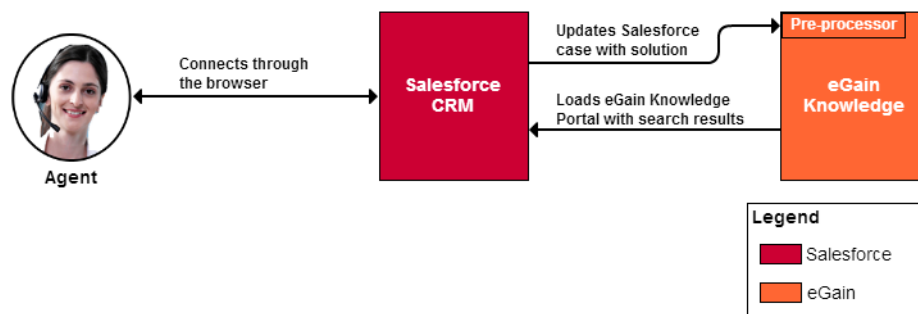


Integration architecture

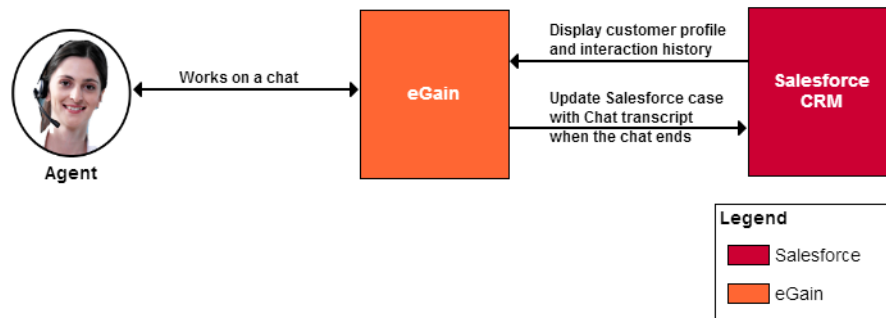
Information Flow

The following diagrams illustrate how the eGain Knowledge application and eGain Chat application work with Salesforce in a typical scenario.

Salesforce and eGain Knowledge



Salesforce and eGain Chat



Prerequisites

eGain 11.1.0

Your deployment must be updated to Release 11.1.0 before you can integrate it with Salesforce.

SSL Configuration

The eGain 11 deployment must be configured to use SSL before you integrate it with Salesforce. For details, see the chapter on SSL configuration in the *eGain 11 Deployment Guide*.



Installing and Configuring Applications

- ▶ [Creating My Domain](#)
- ▶ [Installing the Package](#)
- ▶ [Configuring Salesforce](#)
- ▶ [Configuring eGain 11](#)
- ▶ [Connecting the Applications](#)
- ▶ [Configuring CRM Connectors for Portals](#)

This chapter illustrates the steps necessary to configure Salesforce and eGain 11 to work together.

Before installing any software, you must create your domain. Once a domain is set, installation can begin. Additional information on the installation of eGain 11 can be found in the *eGain 11 Installation Guide*. Once you have installed both Salesforce and eGain, it is time to configure the software. Finally, after that is done, all that is left is to connect the two applications.

Creating My Domain

- ▶ A custom domain created using the My Domain capability of Salesforce is required for the eGain-Salesforce integration. If you have already created a domain, make a note of the fully qualified domain name (FQDN). This is used frequently while configuring the applications.
- ▶ If you have not already created a domain, follow the Salesforce help to create a new domain. See https://help.salesforce.com/HTViewHelpDoc?id=domain_name_setup.htm for details.

Installing the Package

Before beginning the installation, disable your pop-up blocker on the browsers that you will be using. The configuration process for both applications requires that pop-ups be enabled in order to function properly.

To install the package:

1. Log in to Salesforce using the domain URL: `https://domain_name.my.salesforce.com`.
2. To install the managed package, visit the URL:
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tE000000004uMj>
3. If you have any issues during the installation, contact your administrator.

Configuring Salesforce

Once the installations are complete, it's time to begin configuring Salesforce for integration. Salesforce must be configured first because the eGain application requires information provided during the Salesforce setup.

To configure Salesforce:

1. Log in as an administrator.
2. In the upper-right corner of the page, click your username to open the drop-down user menu.
3. Click **Setup**.
4. In the sidebar, go to **App Setup > Develop > Custom Settings**.
5. On the Custom Settings page, click the **Manage** link next to the installed eGain setting.
6. On the eGain Setting page the **Edit** button.

7. On the eGain Setting Edit page, ensure the following values are applied:
 - **Location:** Your company's location.
 - **Portal ID:** Default is 1,000.
 - **Salesforce MyDomain:** The fully qualified domain name (FQDN) of the domain that you are using for the integration.
 - **Template:** The name of the chosen template style.
 - **eGain Context Root:** The name of the context root provided during the eGain installation. The default value is system.
 - **eGain Web Server Hostname:** The FQDN of the eGain 11 web server. In a distributed deployment provide the name of the load balancer.

The screenshot shows the 'eGain Setting Edit' page in a Salesforce interface. The sidebar on the left contains navigation links: Home, Contacts, Cases, eGain Knowledge, and a search bar. Below these are sections for 'Force.com Home', 'System Overview', 'Personal Setup' (with sub-links like My Personal Information, Email, Import, Desktop Integration, My Chatter Settings, My Social Accounts and Contacts), 'App Setup' (with sub-links like Customize, Create, Develop, Apex Classes, Apex Triggers, Apex Test Execution, API, Components, Custom Settings, Email Services, Pages, Sites, Static Resources, Tools, Remote Access, Deploy, Schema Builder, Canvas App Previewer, Installed Packages, AppExchange Marketplace, Critical Updates), and a 'Chat' button at the bottom right.

The main content area is titled 'eGain Setting Edit' and includes a 'Quick Find' search bar. Below the title is a note: 'Provide values for the fields you created. This data is cached with the application.' The form is titled 'Edit eGain Setting' and has 'Save' and 'Cancel' buttons. The form contains the following fields:

- Location:** ABC
- Portal Id:** 1,000
- Salesforce MyDomain:** egsales-dev-ed.my.sa
- Template:** sky
- eGain Context Root:** system
- eGain Web Server Host Name:** pund520.egain.com

Red error indicators are visible next to the Portal Id, Salesforce MyDomain, eGain Context Root, and eGain Web Server Host Name fields, indicating that these fields are required and currently empty or invalid.

Apply the necessary values to the required fields

8. Click **Save**.
9. In the sidebar, navigate to **App Setup > Create > Apps**.
10. Scroll down the page to the Connected Apps section and click **Next**.
11. On the New Connected App page, apply the following required information to the Basic Information section:
 - **Connected App Name:** The recommended value is “eGain”. Service reps are shown this name the first time they access the **eGain Knowledge** tab, which asks permission to use their data, including offline access.
 - **API Name:** This automatically populates with “eGain”.
 - **Contact Email:** The email address of the administrator.

12. In the API (Enable OAuth Settings) section, click the **Enable OAuth Settings** box.
13. In the fields that appear, apply the following:
 - **Callback URL:** Use the following format: `https://eGain FQDN/ContextRoot/sso/oauth2`. *eGain FQDN* is the fully qualified domain name (FQDN) of the web server or load balancer and *ContextRoot* is the context root configured when eGain 11 was installed.

For example: `https://eGain11_Salesforce.company.com/system/sso/oauth2`
 - **Selected OAuth Scopes:** Move the following items over to the right section:
 - Full Access
 - Perform requests on your behalf at any time (if available)

The screenshot shows the 'New Connected App' configuration page. The 'API (Enable OAuth Settings)' section is expanded, showing the 'Enable OAuth Settings' checkbox checked. The 'Callback URL' is set to 'https://eGain11_Webserver/ContextRoot/sso/oauth2'. Under 'Selected OAuth Scopes', 'Full access (full)' and 'Perform requests on your behalf at any time (refresh_token)' are listed. The left sidebar shows navigation options like 'System Overview', 'Personal Setup', 'App Setup', and 'Administration Setup'.

Move over the necessary items

14. In the Web Application Settings section, click the **Enable SAML** box.
15. In the field that appears, apply the following:
 - **Start URL:** This should be in the format: `https://(FQDN of the eGain load balancer)`.
 - **Entity Id:** This should be in the format: `https://eGain FQDN/system`.
 - **ACS URL:** This should be in the format: `https://eGain FQDN/system/sso/acs`.
 - **Subject Type:** Select the Federation ID.
 - **Verify Request Signatures:** Leave the box unchecked for now. This will be needed later.

- **Encrypt SAML Response:** Leave the box unchecked.

The screenshot displays the Salesforce App Setup interface. On the left is a navigation menu with categories like 'Apps', 'Workflow & Approvals', 'Develop', and 'Administration Setup'. The main content area is divided into sections: 'API (Enable OAuth Settings)', 'Web App Settings', 'Mobile App Settings', and 'Canvas App Settings'. In the 'API' section, 'Enable OAuth Settings' is checked, and 'Full access (full)' is selected in the 'Selected OAuth Scopes' list. In the 'Web App Settings' section, 'Enable SAML' is checked, and 'Encrypt SAML Response' is unchecked. The 'Mobile App Settings' and 'Canvas App Settings' sections are also visible.

Leave the Certificate box unchecked for now.

16. Click the **Save** button at the bottom of the page.
17. Once the application is created, make a note of the values below. You need these values to configure eGain 11 for the integration:
 - Consumer Key
 - Consumer Secret (You may need to click the link to view it)

- Callback URL

Note down the necessary values

18. In the sidebar, navigate to **Administration Setup > Security Controls > Identity Provider**.
19. On the Identity Provider page, in the Identity Provider Setup section, click the **Enable** button if it has not already been enabled.
20. Make a note of the value of the Issuer field. (You may need to expand the Details section to view it.)

Note the Issuer field

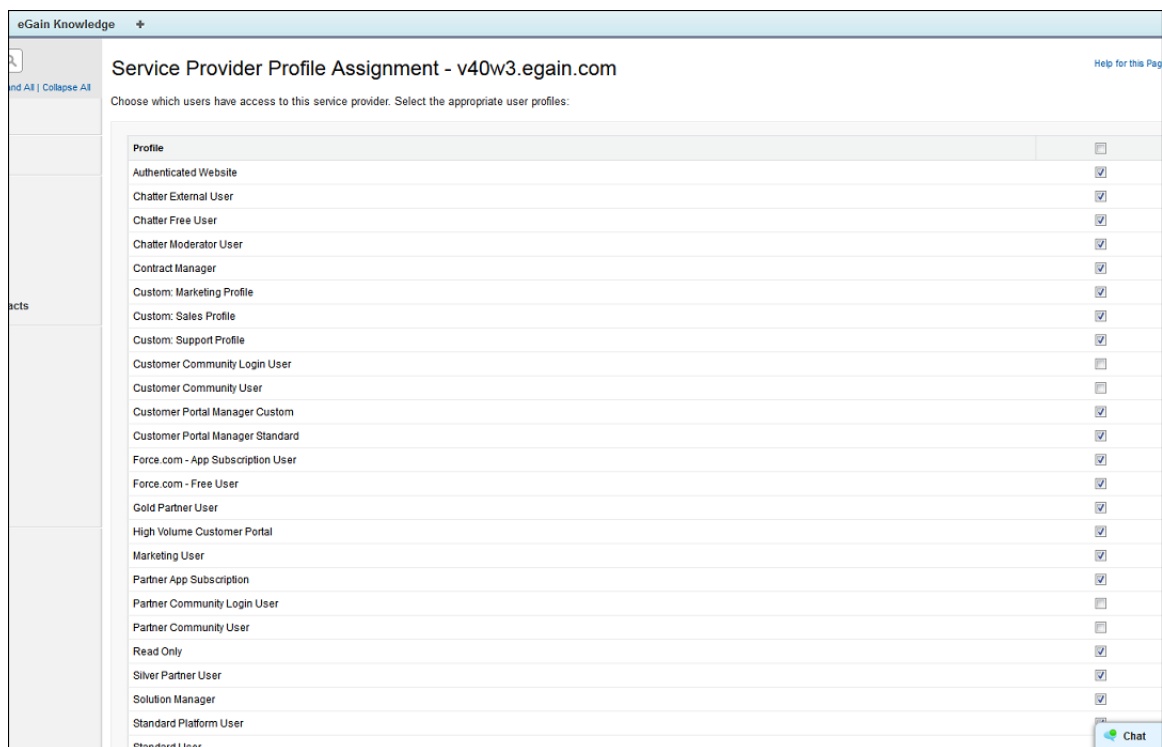
21. In the Currently chosen certificate details section, click the value of the Label field. The Certificates page is displayed.

22. Click the **Download Certificate** button, and save the certificate in a local directory (Desktop).

Setting Application Permissions

To set the application permissions

1. Log in as an administrator.
2. In the upper-right corner of the page, click your username to open the drop-down user menu.
3. Click **Setup**.
4. In the sidebar, navigate to **Administration Setup > Manage Apps > Connected Apps**.
5. Select the connected app you have just created.
6. Click the **Edit** button.
7. On the App page, in the OAuth policies section, open the **Permitted Users** drop-down menu.
8. Select the **Admin approved users are pre-authorized** option.
9. Click **Save**.
10. On the app's page, under the Profiles section, click **Manage Profiles**.
11. Select all the profiles that you want to have access to the **eGain Knowledge** tab.
12. Click **Save**.



Select the profiles that need to access the eGain Knowledge tab

You are now ready to begin configuring eGain 11.

Configuring eGain 11

To configure eGain:

1. Log in to the eGain 11 business partition as a Partition Administrator.
2. In the Consoles window, click **Administration**.
3. In the Tree pane, navigate to **Partition > Integration > Single Sign-On**.
4. In the List pane, click the **New** button.
5. In the Properties pane, under the **General** tab, provide the following:
 - **Configuration Name:** Salesforce
 - **Configuration Description:** A description for your own reference.
 - **Active:** Yes
6. Click the **Configurations** tab.
7. In the SAML2 Configuration section, provide the following information:
 - **eGain Web Server:** The fully qualified domain name (FQDN) of the load balancer web server in your eGain setup. In the case of a distributed install, just enter FQDN for web server.
 - **eGain Entity ID:** This should be in the following format: `https://eGain FQDN/eGain Context`
 - **Identity Provider:** The FQDN of the domain that you are using for the integration.
 - **Identity Provider Entity ID:** The Issuer Value from [Step 20](#) of the Salesforce Configuration.
 - **Identity Provider Signing Certificate:** Skip this section for now. You will revisit it in [Step 10](#).
 - **Does Identity Provider want assertions signed?:** Yes.
 - **Does eGain sign SAML2 Authentication requests?:** Yes.
 - **Organization Name:** The name of your organization.
 - **Organization Unit:** The two letter code for your department.
 - **City:** The name of the city for your organization.
 - **State:** The two letter code for the state for the city.

- **Country:** Select the country for your organization.

Name	Value
eGain Web Server(FQDN) *	company.egain.net
eGain Entity ID *	https://company.egain.net/system
Identity Provider (FQDN) *	egtest.dev-ed.my.salesforce.com
Identity Provider Entity ID *	https://egtest.dev-ed.my.salesforce.com
Identity Provider Signing Certificate...	...
Does Identity Provider want asse...	*yes
Does eGain sign SAML2 Authentic...	*yes
Organization Name *	eGain Inc.
Organization Unit *	PE
City *	Sunnyvale
State (2 letter code) *	CA
Country *	United States

Ready

Enter the values to generate a certificate

The last five values are used to generate a self-signed certificate, which is used to sign all SAML2 requests in the SAML2 Single Sign-On flow.

- Enter the following values in the OAuth2 Configuration section:
 - **Client ID:** The Consumer Key from [Step 17](#) of the Salesforce Configuration.
 - **Client Secret:** The Consumer Secret from [Step 17](#) of the Salesforce Configuration.
 - **Scope:** All
 - **Redirect URI:** It should be in the following format: `https://eGain FQDN/eGain Context/sso/oauth2`
 - **Endpoint URL:** Enter the following URL string:
`https://login.salesforce.com/services/oauth2/authorize?response_type=code&client_id=<client_id>&redirect_uri=<redirect_uri>&state=<state>`
 - **Token Request URL:** Enter the following URL string:
`https://login.salesforce.com/services/oauth2/token`
 - **Token Request Parameters:** Enter the following:
`code=<code>&grant_type=authorization_code&client_id=<client_id>&client_secret=<client_secret>&redirect_uri=<redirect_uri>`

- **Module Name:** default

Name	Value
OAuth2 ClientId *	3MVG9A2kN3Bn17hvxXUcUD5TNFzIMhx2FYF2nFrWjchrILpF.r8EQpUDAwIX8fRaU...
OAuth2 ClientSecret *	6794149732029416937
Scope *	All
Redirect URI *	https://company.egain.net/system/sso/oauth2
Endpoint URI *	https://login.salesforce.com/services/oauth2/authorize?response_type=code&clie...
Token Request URI *	https://login.salesforce.com/services/oauth2/token
Token Request Params *	code=<code>&grant_type=authorization_code&client_id=<client_id>&client_sec...
Module Name *	default

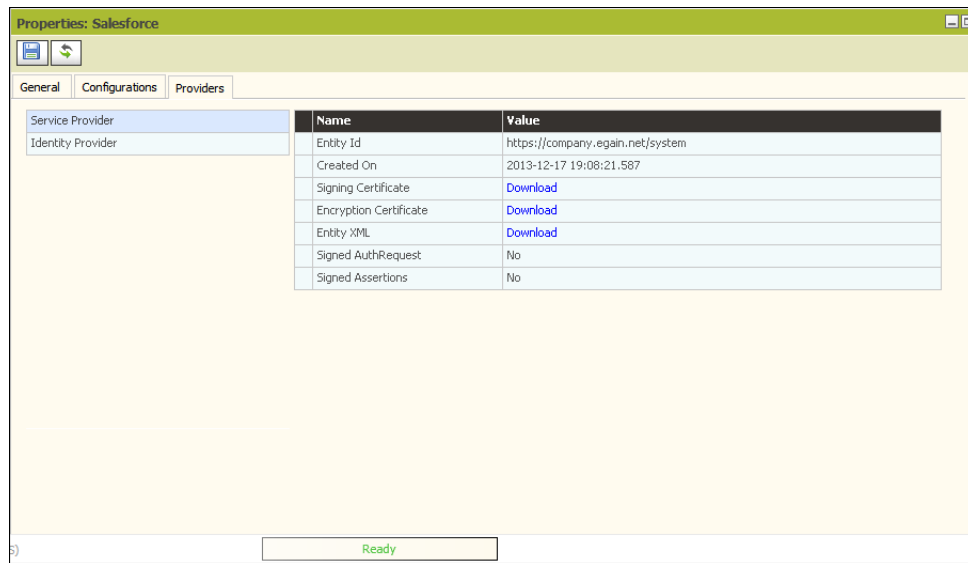
Use the Consumer Key and ID you received during the Salesforce configuration

9. Click the **Save** button.
10. Click on the SAML2 section, again.

The Identity Provider Signing Certification section's browse option has become available since you've saved your changes.

11. Click the **Assistance** button to browse and select the Identity Provider certificate that you downloaded in [Step 22](#) the Salesforce Configuration.
12. Click the **Save** button.
13. Click the **Providers** tab.

14. In the Service Provider section, click the **Download** link next to Signing Certificate.



Download the certificate

15. Save the certificate to your desktop.

Connecting the Applications

Now that you have finished the initial setup for both applications, it's time to make sure they can communicate with each other. First, you need to briefly revisit a page on the Salesforce CRM. Once you are done establishing the Salesforce connection, return to the eGain application.

Connecting Salesforce

To connect Salesforce:

1. Log in as an administrator.
2. In the upper-right corner of the page, click your username to open the drop-down user menu.
3. Click **Setup**.
4. On the sidebar, navigate to **App Setup > Create > Apps**.
5. On the Apps page, in the Connected Apps section, click the **Edit** button by the eGain app you created earlier.
6. On the eGain (Connected App) page, in the Web App Settings section, click **Verify Request Signatures** box.
7. Click the **Browse** button to locate and upload the Signing Certificate you downloaded in [Step 15](#) of the previous section.

- Click **Save**.

Connecting eGain

To connect eGain:

- Log in to the eGain application as a Partition Administrator.
- Access the Administrator console.
- In the Tree pane, navigate to **Partition > Settings > Partition**.
- In the List pane, select **Partition Settings Group**.
- In the Properties pane, select the **Attributes** tab.
- In the list of settings on the left side, scroll down the list till you see Enable Salesforce Integration.
- Click **Enable Salesforce Integration**.
- In the list on the right, in the Value row, select **Yes**.
- Click the **Save** button.

The screenshot shows the eGain Administration console. The left pane displays a tree structure with 'Administration' expanded, showing 'Partition: default', 'Settings', 'Department', 'Partition', 'User', and 'Departments'. The 'Partition' item is selected. The main pane shows the 'List: Partition' view with a table containing one row: 'Partition Settings Group' with the description 'These settings pertain to the partition as a whole'. Below this is the 'Properties: Partition Settings Group' section, which has two tabs: 'General' and 'Attributes'. The 'Attributes' tab is active, showing a table with two columns: 'Setting Name' and 'Subtype'. The table lists several settings, including 'Enable Salesforce Integration' with a subtype of 'Integration'. The 'Value' column for this setting is highlighted with a red box, and the value 'Yes' is selected from a dropdown menu. At the bottom of the console, the status bar shows 'User name: pa | UI: English | KB: English (US)' and a green 'Ready' button.

Setting Name	Subtype	Name	Value
Enable Salesforce Integration	Integration	String	integration.enable_salesforce_integration
Update External Attachment service update...	Knowledge Base	Description	Enable Salesforce Integration
Popular articles display count	Knowledge Base	Default value	No
Popular articles evaluation period in days	Knowledge Base	Value *	Yes
Popular articles update interval in hours	Knowledge Base	Can be reset at lower level	No

Select Yes in the Value field and save

Configuring CRM Connectors for Portals

The eGain application and Salesforce CRM are now communicating with one another. However, eGain Knowledge integration requires a few more steps before the CRM can navigate knowledge portals. The steps below illustrate how to connect the CRM to the knowledge base through the eGain application.

To configure the CRM connector for a portal:

1. Log in to the eGain application as an author.
2. In the KB Console, browse to **Departments** > *Department_Name* > **Portals** > **Portals**.
3. In the List pane, select the portal in which you want to set up CRM connectors. Details of the portal are displayed in the Properties pane.
4. In the Properties pane, select the **Connector** tab.
5. Go to the General section and set the following:
 - **Name:** Provide a name for the connector.
 - **Description:** Provide a description for the connector. This field is optional.
 - **Type:** Select **Salesforce**.
 - **Unique Parameter Name:** Set the name as **CUSTOM_CASEID**.
 - **CRM Domain:** Provide your Salesforce MyDomain FQDN.
 - **Active:** Select **Yes**.

The screenshot shows the eGain KB Console interface. On the left is a tree view with 'Knowledge Base' expanded, showing 'Lists', 'Departments', 'Service', 'Case Bases', 'Content', 'Portals', and 'Topics'. The 'Portals' folder is selected. The main area is divided into a 'List: Portals' section and a 'Properties: Salesforce Portal' section. The 'List: Portals' section contains a table with one row: 'Salesforce Portal'.

Name	Description (SEO)	Created by	Creation time
Salesforce Portal		pa	6/10/2013 9:19:43 AM

The 'Properties: Salesforce Portal' section has a 'Manage Portals' button and tabs for 'General', 'Topics', 'Access Methods', 'Article Display', 'More Options', and 'Connector'. The 'Connector' tab is selected, showing a 'General' section with a table of connector properties.

Name	Value
Name	Salesforce
Description	Salesforce
Type	Salesforce
Unique Parameter Name	CUSTOM_CASEID
CRM Domain	egsales-dev-ed.my.salesforce.com
Active	Yes

Click the **Connector** tab

6. Click the **Save** button.

The Knowledge Base can now be accessed through the Salesforce CRM.