Einstein Conversation Insights Dialpad Configuration Guide

Salesforce, Spring '24

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CONTENTS

CONFIGURE DIALPAD WITH EINSTEIN CONVERSATION INSIGHTS

Follow these tasks to integrate Dialpad with Einstein Conversation Insights (ECI).

Complete these steps after installing and launching the Voice Connector app.

Additional steps are required to complete the integration process and turn on the feature. See the ECI Voice Connector Guide for more details.

Log In as the Integration User

Before you can set up the integration between the voice connector and Einstein Conversation Insights (ECI), a user with Salesforce admin permissions is required to be available for the integration. This user is typically a separate user created for the purpose of integrations. Make sure you're logged in as this user for the configuration tasks.

Add Dialpad as an Authorized Provider

Add an authorized provider from the Setup menu. Make sure you have access to your Salesforce org and email for this task.

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Add the named credentials for the voice provider from the Setup menu.

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To call the Einstein Conversation Insights (ECI) web service, create a connected app. If you've configured another voice connector, skip the remaining configuration tasks.

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If a site isn't created, set up an active Salesforce site.

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Contact Dialpad Support prior to enabling Dialpad integration to capture automatic recording events.

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An integration user is assigned the custom access necessary to complete integrations between ECI and your voice provider. It's a Salesforce best practice to use a separate user for this purpose and to dedicate this user to this integration.

1. Add a user as an integration user by following the standard process to set up a user. See Add a Single User.

   Make sure **System Administrator** is selected for the Profile. The user also needs **API Enabled** enabled, access to the Voice Call object, an ECI access permission set, and the Conversation Insights Integration User permission set assigned.

2. Log in as the integration user, and open the Voice Connector app.

3. Use the integration user to complete the configuration tasks.

Add Dialpad as an Authorized Provider

Add an authorized provider from the Setup menu. Make sure you have access to your Salesforce org and email for this task.

1. From Setup, enter `Identity` in the Quick Find box, and then select **Auth. Providers**.

2. Click **New**.

3. Select **Open ID Connect** for the Provider Type.

4. Complete these fields with the specified information.

   • Name: `Dialpad`

   • URL Suffix: `dialpad`

   • Consumer Key: `DummyConsumerKey`

   > 📝 Note: Consumer Key and Consumer Secret are required, but this information is obtained later as Dialpad creates the app. Use the listed input for now.

   • Consumer Secret: `DummyConsumerSecret`

   • Authorize Endpoint URL:
     – Sandbox: `https://sandbox.dialpad.com/oauth2/authorize`
     – Production: `https://dialpad.com/oauth2/authorize`

   • Token Endpoint URL:
     – Sandbox: `https://sandbox.dialpad.com/oauth2/token`
     – Production: `https://dialpad.com/oauth2/token`

   • Default Scopes: `recordings_export`

   • Send access token in header: selected

- Send client credentials in header: selected
- Include Consumer Secret in API Responses: selected

5. Click **Save**.

6. Copy the generated Callback URL under Salesforce Configuration.

7. Email api@dialpad.com requesting the application registration with this information:

Redirect URIs: Callback URL copied from Auth. Provider

Name of the OAuth App: a name for the app

Scopes: recordings_export

8. After you receive an email from Dialpad, complete the provided form with the values specified.

App Name: The same name that was sent in the mail as the name of the OAuth app

Developer Name: Your organization name

Developer Email: youremail@sample .com

App Support Email: youremail@sample .com

Developer Type: Other

App Type: The use for the app

App Description: Testing App

App Environment: The environment you plan to use the app in, such as production

Scores: Recording Export

Redirect URLs: The URL you included in your first email

9. After you receive the information from Dialpad, go to the Auth. Providers Setup page and replace the Consumer Key and Consumer Secret values.

10. Click **Save**.

Add Dialpad Named Credentials

Add the named credentials for the voice provider from the Setup menu.

1. From Setup, enter `Named Credentials` in the Quick Find box, and then select **Named Credentials**.

2. Click the dropdown next to New and select **New Legacy**.

3. Complete these fields with the specified information.
   - Label: *Dialpad*
   - Name: *Dialpad*
   - URL:
     - Sandbox: *https://sandbox.dialpad.com*
     - Production: *https://dialpad.com*
   - Identity Type: *Named Principal*
   - Authentication Protocol: *OAuth 2.0*
   - Authentication Provider: *Dialpad*
   - Scope: *recordings_export*
   - Start Authentication Flow on Save: selected
   - Generate Authorization Header: selected

4. Click **Save**.

5. After you save, a login and an authorization page are shown. Follow the process to validate the account and click **Allow**.

6. Return to the Named Credentials page and verify that the Authentication Status now reads Authenticated.

Set Up the Connected App

To call the Einstein Conversation Insights (ECI) web service, create a connected app. If you've configured another voice connector, skip the remaining configuration tasks.

📝 **Note:** The remaining tasks in this guide have been completed if you've configured another connector.

1. From Setup, enter `App Manager` in the Quick Find box, and then select **App Manager**.

2. Click **New Connected App**.

3. Complete these fields in the Basic Information section.
   - Connected App Name: *ECI Connected App*
   - API Name: *ECI_Connected_App*

     🛑 **Important:** Use this exact name.

   - Contact Email: [the email address you want to use]

4. Select **Enable OAuth Settings** and complete these fields.
   - Callback URL: https://dummy_url/services/authcallback/ECI_Auth_Provider

📝   **Note:**   This URL is obtained after you create the Auth Provider in the next section.

- Selected OAuth Scopes:
  - Access content resources (content)
  - Manage user data via APIs (api)
  - Manage user data via Web browsers (web)
  - Perform requests at any time (refresh_token, offline_access)
- Require Secret for Web Server Flow: selected
- Require Secret for Refresh Token Flow: selected

5. Click **Save**.

   Changes can take up to 10 minutes to take effect. Deleting a parent org deletes all connected apps with OAuth settings enabled.

6. After the ECI Connected App is created, return to the App Manager page. Click the dropdown in the ECI Connected App row, and then click **Manage**.

7. Click **Edit Policies**.

8. Complete these fields.

   - Permitted Users: *Admin approved users are pre-authorized*
   - IP Relaxation: *Relax IP restrictions*
   - Refresh Token Policy *Expire refresh token after 365 days*

   It's not necessary to select **High assurance session required** even though the checkbox is marked as required.

9. Click **Save**.

10. From the ECI Connected App Setup page, click **Manage Profiles** in the Profiles section.

11. Select the profiles you want to give access to, and then click **Save**.

    We recommend selecting Standard User, System Administrator, and any other profiles that use the connected app.

12. From the App Manager page, select the dropdown in the ECI Connected App row, and then click **View**.

13. Click **Manage Consumer Details** to see the Consumer Key and the Consumer Secret.
    A new window opens.

14. Enter the verification code sent to you over email.

15. The Consumer Key and Consumer Secret values are shown. Keep this window open, because these values are required to create the Auth Provider for the ECI Connected App.

Add ECI as an Authorized Provider

Add Einstein Conversation Insights (ECI) as an authorized provider from the Setup menu.

1. From Setup, enter *Identity* in the Quick Find box, and then select **Auth. Providers**.

2. Click **New**.

3. Select **Salesforce** for the Provider Type.

4. Complete these fields with the specified information.

    * Name: *ECI Auth Provider*
    * URL Suffix: *ECI_Auth_Provider*

        🛇 Important: Use this exact name.

    * Consumer Key: Add the Consumer Key from the previous task here.
    * Consumer Secret: Add the Consumer Secret from the previous task here.

5. Click **Save**.
    The Callback URL can be obtained.

6. Copy the Callback URL, and replace the dummy one in the ECI Connected App.

7. From the App Manager page, go to the ECI Connected App and replace the dummy Callback URL value with the copied one.

8. Click **Save**.

    Changes can take up to 10 minutes to take effect. Deleting a parent org also deletes all connected apps with OAuth settings enabled.

Set Up the Salesforce Site

If a site isn't created, set up an active Salesforce site.

1. From Setup, enter *Sites* in the Quick Find box, and then select **Sites**.

2. Select the checkbox, and then select **Register My Salesforce Site Domain**.

3. Click **New**.

4. Complete these fields with the specified information.

    * Site Label: *VoiceConnector*
    * Site Name: *VoiceConnector*
    * Site Contact: [the email address you want to use]
    * Default Record Owner: a Salesforce admin is recommended
    * Active: selected
    * Active Site Home Page: *SiteLogin*
    * Clickjack Protection Level: *Allow framing by the same origin only (Recommended)*

5. Leave the other options as default, and then click **Save**.

Add ECI Named Credentials

Add the named credentials for ECI from the Setup menu.

1. From Setup, enter `Named Credentials` in the Quick Find box, and then select **Named Credentials**.

2. Click the dropdown next to New and select **New Legacy**.

3. Complete these fields with the specified information.

    - Label: `ECI Named Credential`
    - Name: `ECI_Named_Credential`
    - URL: `https://your_domain/`Replace "your_domain" with your actual domain that is obtained from the Domains page in Setup. It's labeled My Domain under the Current HTTPS Option column.
    - Identity Type: `Named Principal`
    - Authentication Protocol: `OAuth 2.0`
    - Authentication Provider: `ECI Auth Provider`
    - Scope: `refresh_token web api content`
    - Start Authentication Flow on Save: selected
    - Generate Authorization Header: selected

4. Click **Save**.

5. A login and an authorization page are shown. Follow the process to validate the account, and then click **Authorize**.

6. Return to the Named Credentials page and verify that the Authentication Status now reads Authenticated with [your integration user with admin permissions].

Assign the Guest User Permission Set

Assign the guest user permission set from Setup.

1. From the Search box at the top of Setup, enter `Guest User` and select **Voice Connector Guest User**.

2. Make sure this user is marked Active.

3. Click **Permission Sets**.

4. Click **Edit Assignments**.

5. Add **Voice Connector Permission**.

6. Add **Conversation Insights Integration User**.

7. Click **Save**.

Enable Auto Recording Capture

Contact Dialpad Support prior to enabling Dialpad integration to capture automatic recording events.

By default, Dialpad apps can't capture automatic recording events. An additional admin_recording event subscription is required to capture them. Contact Dialpad Support and request that they turn on automatic recording capture.

You can use Dialpad integration without the feature, but automatically recorded calls won't be processed. Without automatic recording capture, only calls that are manually recorded by a rep are processed.

After you've contacted Dialpad Support, when you're about to enable Dialpad integration, select **Enable Auto Recording Capture** from the Voice Connector app.

EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Performance** and **Unlimited** Editions, and for an additional cost in **Enterprise Edition**