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Lightning Guided Engagement Developer Guide

Salesforce, Summer '18

Launch flows as tabs in console apps and guide your users



 @salesforcedocs

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CONTENTS

LIGHTNING GUIDED ENGAGEMENT	1
Supported Apps, Channels, and Objects	2
Considerations	2
Sample Use Case	3
Implementation Checklist	5
CREATE FLOWS	7
ASSOCIATE FLOWS WITH RECORDS	8
Using Process Builder	8
Using SOAP	11
Using Apex	11
Using a Component	12
CREATE CUSTOM CONSOLE PAGES	14
INTEGRATE WITH LIVE AGENT	18
INTEGRATE WITH OPEN CTI	19
OTHER RESOURCES	21

LIGHTNING GUIDED ENGAGEMENT

Guide your users through multi-step processes with Lightning Guided Engagement, and associate records to flows using Salesforce automation tools. When a record that has an associated flow is opened in a console app, the flow is launched as a subtab. You can configure default flows for specific channels, like phone and chat, and specify which flows you want users to complete first and last. You can even package your Lightning Guided Engagement implementation to share it on the AppExchange.

Lightning Guided Engagement includes the following objects, features, and functionality:

- Lightning flows
- Salesforce process automation tools, like Process Builder
- RecordAction junction object
- Guided Action List component

This Lightning component lets you configure default channel-specific flows. For each channel, you can choose to auto-launch the first flow and also configure which flows to display first and last.

- Lightning page templates that are optimized for viewing flows within the console
- Open CTI softphone settings to allow screen pops to flows

To set up Lightning Guided Engagement, use the RecordAction object. This object lets you associate records to flows using Salesforce automation tools. After you set up your flows and processes, add the Guided Action List component to your Lightning pages to display your flows to users. When records are opened in the console and there's an associated flow, the flow is launched as a subtab. The Guided Action List component helps your users:

- Identify which flows to complete for a specific record, and in which order
- Pause and restart flows
- View the stages in an active flow
- Add more flows based on customer needs

Never heard of flows and process automation? Many of the tasks you assign, the emails you send, and other record updates are vital parts of your standard business processes. Instead of doing this repetitive work manually, you can configure processes to do it automatically. To learn more, check out the [Cloud Flow Designer Guide](#).

IN THIS SECTION:

[Supported Apps, Channels, and Objects for Lightning Guided Engagement](#)

Lightning Guided Engagement is supported in Lightning apps with console navigation, and with limited support in Lightning apps with standard navigation.

[Lightning Guided Engagement Considerations](#)

Learn about how packaging and the sharing model can impact your Lightning Guided Engagement implementation.

[Lightning Guided Engagement Sample Use Case Scenario](#)

Lightning Guided Engagement is great for Service Cloud. When a support issue comes into the Service Console, a preconfigured flow can be associated to a new record and launched as a subtab of the case record. Agents walk through the flow and can add more flows based on the customer's needs.

EDITIONS

Available in: Lightning Experience

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Lightning console apps are available for an extra cost to users with Salesforce Platform user licenses for certain products. Some restrictions apply. For pricing details, contact your Salesforce account executive.

[Lightning Guided Engagement Implementation Checklist](#)

Review the Lightning Guided Engagement checklist before you roll out your implementation.

Supported Apps, Channels, and Objects for Lightning Guided Engagement

Lightning Guided Engagement is supported in Lightning apps with console navigation, and with limited support in Lightning apps with standard navigation.

You can set up Lightning Guided Engagement to work with Open CTI for phone integration (including support for unknown callers) and Live Agent in Lightning Experience for chat integration.

Lightning Guided Engagement supports the following objects:

- Accounts
- Assets
- Cases
- Contacts
- Contracts
- Leads
- Live Chat Transcripts
- Opportunities
- Orders
- Products
- Social Posts
- Tasks



Note: Custom objects are also supported.

SEE ALSO:

[Salesforce Help: Salesforce Console in Lightning Experience](#)

[Salesforce Help: Salesforce Call Center](#)

[Salesforce Help: Live Agent Chat](#)

Lightning Guided Engagement Considerations


Learn about how packaging and the sharing model can impact your Lightning Guided Engagement implementation.

Packaging

When you package up your implementation, processes and flows that reference a flow through RecordAction are automatically included in the package. For example, if Flow A creates a RecordAction that references Flow B, then adding Flow A to a package also adds Flow B to the package.

When you add your console app to the package, here's what's included:


- All the objects in the app

- For each object, the associated page layouts, Lightning pages (including the page with the Guided Action List component), active processes, and quick actions
 - If a process includes Flow actions, those flows are included
 - If an object includes flow quick actions, those flows are included
-  **Note:** If you package a process or flow that creates RecordAction records, the associated flow is included in the package only if you used the Picklist type to select the flow. If you manually entered the flow name or used a formula, you must manually add the flow to the package.

Sharing Model

Access to the RecordAction object is determined by a user's access to the associated parent record. This sharing model applies to access in the user interface, API, and Bulk-API.

- If the user has Read access on the object that the flow is associated with, the user can perform all operations (Create, Read, Update, and Delete) on the corresponding RecordAction.
- If the user doesn't have Read access on the object the flow is associated with, then the user doesn't have access to the associated RecordAction.

-  **Note:** When using RecordAction and Salesforce Object Query Language (SOQL), make sure that your queries filter by the parent record. To filter by the parent record, use a where clause for users without Modify All Data permission. Otherwise, the query doesn't work. If the user has Modify All Data permission, you don't need to use a where clause to filter correctly.

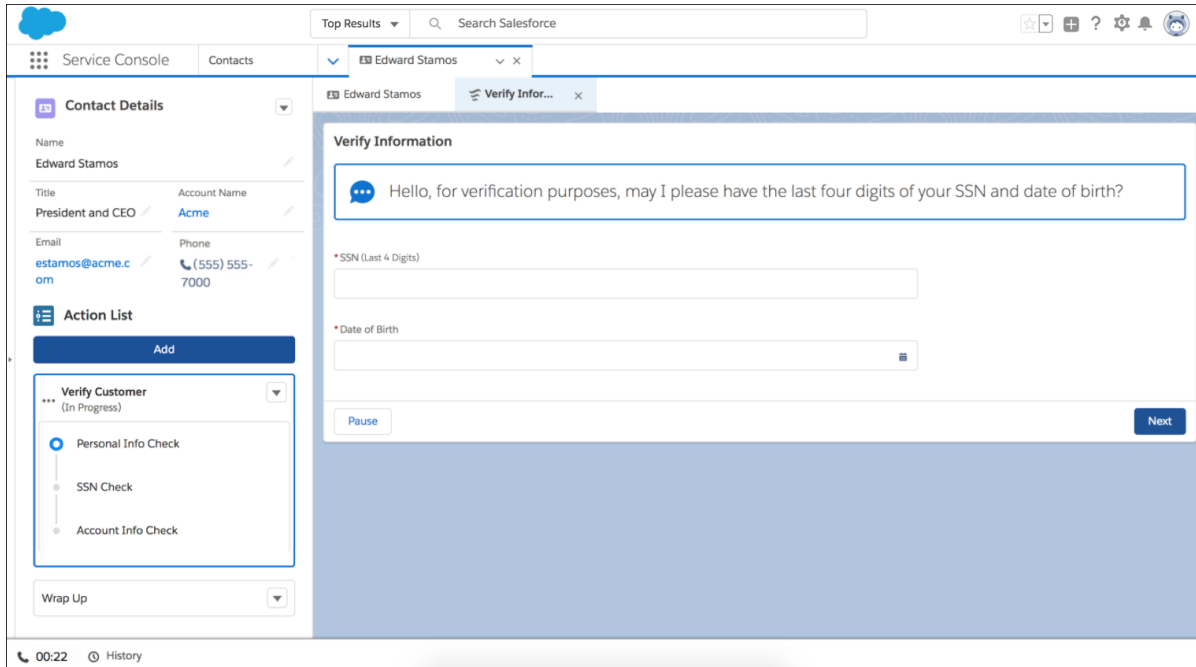
Here's an example of a where clause for RecordAction.

```
SELECT fields FROM RecordAction WHERE RecordId=ENTITY_ID
```

Lightning Guided Engagement Sample Use Case Scenario

Lightning Guided Engagement is great for Service Cloud. When a support issue comes into the Service Console, a preconfigured flow can be associated to a new record and launched as a subtab of the case record. Agents walk through the flow and can add more flows based on the customer's needs.

Here's an example of Lightning Guided Engagement set up in the Service Console app that helps agents verify contact information for an incoming caller.



Now let's look at the fictional Service Cloud customer, Awesome Bank Company. They employ 20 agents who handle calls from customers about loans. Typically, an agent handles a call with an unknown caller, who is a potential loan customer, in the following way:

1. The customer's call is routed to the appropriate agent based on the loan type.
2. An agent takes basic information about the customer, such as their name and phone number.
3. An agent verifies the loan type that the customer is looking for. Agent follows a series of steps to process the loan application.
4. When the loan application is processed successfully, the application enters the approval process.
5. When the loan application is approved, the loan is sent for disbursement.
6. An agent wraps up the loan application.

Meet Cyrus, the Service Team Leader. He's in charge of the customer service department and is looking at ways to improve agent efficiency. He wants to streamline the following:

- Common steps that are applicable to all loan types
- Unique steps specific to the loan type

Cyrus wants an automated way of associating the flows dynamically to a record. Cyrus approaches Maria, the Service Admin who is in charge of handling and administering Salesforce applications for Awesome Bank. Cyrus hopes Maria can come up with a solution that improves the overall productivity of agents and give them more flexibility.

Lightning Guided Engagement can make the lives of admins, like Maria, easier by providing a way to preconfigure flows and associate them to new records. With Lightning Guided Engagement, Maria can provide Awesome Bank agents:

- A dynamic set of flows associated to a record so agents can see all the flows to complete upfront
- An easy way for agents to search for and add more flows based on customer needs

Sample Implementation Steps

To implement Lightning Guided Engagement and integrate with Awesome Bank's Open CTI implementation, Maria completes the following tasks:

1. Create flows in Cloud Flow Designer.

- To handle unknown callers, Maria creates a flow called Create Contact that walks agents through creating a new contact.
- To walk agents through the initial steps for new customers that want a loan, she creates a flow called New Loan.
- To let agents process the loan, she creates a flow called Process Loan.
- To walk agents through the wrap-up steps, she creates a flow called Wrap Up Loan.

2. Update the Screen Pop Settings for the softphone layout in Setup (in Lightning Experience).

To handle unknown callers, Maria updates the No Matching Records setting to pop to the unknown caller flow, Create Contact. This setting ensures that when an agent accepts a call from an unknown caller, they're automatically presented with a flow to create a new contact record.

3. Associate flows to records in Process Builder.

Maria creates a process that associates the flows New Loan, Process Loan, and Wrap Up Loan to the contact object using the RecordAction object.


4. Edit Lightning console record pages.

To display a list of associated flows to agents, Maria adds the Guided Action List component to pages in the Service Console. This component lets agents see the list of flows defined in Step 1 and also lets them add more flows based on the customer's needs.

 **Note:** Steps 1 and 3 can also be completed using the API.

Lightning Guided Engagement Implementation Checklist

Review the Lightning Guided Engagement checklist before you roll out your implementation.

 **Tip:** If you're new to process automation, we recommend completing the [Automate Your Business Processes with Lightning Flows](#) trail on Trailhead.

We recommend that you have a working knowledge of the following features and user interfaces:

- Process automation tools, like Process Builder and Cloud Flow Designer
- Lightning App Builder
- Lightning console apps
- Open CTI
- Live Agent

You need the following permissions to complete an end-to-end implementation.

User Permission Needed	
To create flows in Cloud Flow Designer:	Manage Flow
To create a process in Process Builder:	Manage Flow AND View All Data
To create and save pages in the Lightning App Builder:	Customize Application
To create or manage Lightning console apps:	
To set up and configure Live Agent:	
To set up and configure Open CTI:	Manage Call Centers


Use the following individual setup tasks when implementing Lightning Guided Engagement.


Task	Complete If...
Create Flows in the Cloud Flow Designer for Lightning Guided Engagement	You want to create a new flow.
Associate Flows to Records with Process Builder	You want to create a process for your flows declaratively using Process Builder.
Associate Flows to Records with SOAP	You want to associate flows to records programmatically using the SOAP API.
Associate Flows to Records with Apex	You want to associate flows to records programmatically using Apex.
Customize Your Lightning Console Pages with the Guided Action List Component	You want to add a list of flows to record pages in your app and associate default channel-specific flows declaratively.
Integrate Live Agent with Lightning Guided Engagement	You want to integrate Lightning Guided Engagement with Live Agent.
Integrate Open CTI with Lightning Guided Engagement	You want to integrate Lightning Guided Engagement with Open CTI and configure your softphone screen pop settings.

CREATE FLOWS IN THE CLOUD FLOW DESIGNER FOR LIGHTNING GUIDED ENGAGEMENT

Cloud Flow Designer is a point-and-click tool that lets you automate business processes with flows—guided visual experiences for your users. Flows can handle complex branching logic, UI input, and even Lightning components as screen components or actions. Create flows that automate tasks your users typically do manually, like verifying a caller or wrapping up a call.

1. Create a flow.

 **Note:** The Guided Action List component displays screen flows only. The component also displays stages in a flow, so users always know where they are in a process.


 **Note:** If you want to pass the parent record ID into a flow when it's launched from the Guided Action List component, create a flow text input variable named `recordId`. (The name is case sensitive.) When an agent launches the flow from the Guided Action List, the parent record ID is automatically passed into that flow variable.

2. Test your flow.

Test your flows before you activate them to make sure they're working as expected.

3. Activate your flow.

Your flows must be activated so that you can use them in your process.

 **Example:** Create a Verify Information flow for when agents verify a contact's information. In the Cloud Flow Designer, create a screen flow with fields to verify the caller. Here's a high-level view of what to do in the Cloud Flow Designer.

- Add a screen with the fields: First Name, Last Name, Phone Number, Email, and Mailing Address.
- Add a Record Lookup element to look up the contact based on the inputs on the screen.
- Based on the lookup results, either mark the verification as success or failure.

Here are some other examples of flows to create:

- Create New Contact
- Update Contact Info
- Wrap Up Call

Now that you have flows created, you can associate them with records using RecordActions.

SEE ALSO:

[Associate Flows with Records](#)

[Cloud Flow Designer Guide: Use Lightning Components with Flows](#)

[Cloud Flow Designer Guide: Show Users Progress Through a Flow with Stages](#)

ASSOCIATE FLOWS WITH RECORDS

To associate flows to records declaratively, use Process Builder or configure channel-specific default flows using the Guided Action List component. To associate flows to records programmatically, use SOAP or Apex.

IN THIS SECTION:

[Associate Flows to Records with Process Builder](#)

Process Builder is a point-and-click automation tool that lets you design processes that kick off when a new or updated record meets specific criteria. After you create, test, and activate your flows, associate the flows with a record by building a process. Use Process Builder to create a process that, when triggered, creates a RecordAction. A RecordAction represents an association between a flow and a record that kicked off the process. When the process is triggered, a RecordAction is created.

[Associate Flows to Records with SOAP](#)

If your business maintains code outside the Salesforce platform, you can use the SOAP API to create, retrieve, update, or delete a RecordAction just like any other standard object.

[Associate Flows to Records with Apex](#)

If you want to control how you trigger the creation of a RecordAction, you can use Apex to associate flows to records. The RecordAction object is exposed as a standard object in Apex and you can trigger it before DML operation, on delete or undelete, and even provide custom error handling.

[Associate Default Flows to Records with the Guided Action List Component](#)

Use the Guided Action List component to add default flows for when records open from phone screen pops, Live Agents chats, and even when records open from list views or related records. Use the Lightning App Builder to add the Guided Action List component to your page, then edit the component's channel settings. The flows you configure in the Default Actions section are associated to the record when it's opened in context of that channel and no other RecordAction associations exist.

SEE ALSO:

[Developer Documentation: Process Automation Cheatsheet](#)

Associate Flows to Records with Process Builder

Process Builder is a point-and-click automation tool that lets you design processes that kick off when a new or updated record meets specific criteria. After you create, test, and activate your flows, associate the flows with a record by building a process. Use Process Builder to create a process that, when triggered, creates a RecordAction. A RecordAction represents an association between a flow and a record that kicked off the process. When the process is triggered, a RecordAction is created.

Associated flows for a record show up in the record's Guided Action List component, ready for your users to start. Keep in mind that flows you associate to records using Process Builder override any default channel-specific flows you specify in the Guided Action List component.

To create a process, follow these steps.

1. [Define the process properties.](#)

The process properties uniquely identify your process.

2. [Configure the process trigger.](#)


Every process includes a trigger, which tells the process when to start. How you configure that trigger depends on what type of process you're creating.


3. Add process criteria.

Define the criteria that must be true before the process can execute the associated actions.

4. Add actions to your process and create a record from the process.

After you define a criteria node, create a record from the process when criteria are met. Actions are executed in the order in which they appear in the Process Builder.

 **Note:** `Flows` is a supported Action Type in Process Builder. This type is different from creating a `RecordAction`. The `Flows` Action Type supports only flows that don't have screens, and is invoked immediately when the process is triggered. Creating a `RecordAction` doesn't invoke the flow; rather, it associates a record with the flow so that your users can run it.

 **Important:** To associate flows to records, you must create a `RecordAction`.

Specify the following.


- Action Type: `Create a Record`
- Record Type: `RecordAction`

Set field values for the `Create a Record` action.

Field	Type	Value
Flow	Picklist	Specify the flow you want associated to the record.
Order	Number	Specify the order of the flow among all flows associated with this record. Flows are ordered in comparison to other flows in their pinned or unpinned region. If two flows have the same order, then the flows are sorted by their last modified date.
Parent Record ID	Field Reference	Specify the record associated with the flow. For most use cases, select the ID for the object you've selected for your process trigger. For example, if you used the contact object, set the value to <code>[Contact].Id</code> .
Pinned	Picklist	Specify whether the flow is pinned to the top or bottom of the Guided Action List component. Users can't delete pinned flows from the Guided Action List, however they can be deleted using the API. To display the flow between pinned flows, use <code>None</code> . Users can delete flows that use <code>None</code> because they aren't pinned.

5. Activate your process.

When your criteria is met and your process runs, the flow you specified is associated to the parent record.

 **Example:** Create a process that adds a flow for users to verify a contact's information, like their address and email, for additional changes when their phone number changes.

- Choose the contact object and start the process when a record is created or edited

Choose Object and Specify When to Start the Process ?

Object*

Contact

Start the process*

only when a record is created

when a record is created or edited

> Advanced

- Create criteria for when the `[Contact].MobilePhone` field changes

Define Criteria for this Action Group

Criteria Name* !

Changed Phone Number

Criteria for Executing Actions*

Conditions are met

Formula evaluates to true

No criteria—just execute the actions!

Set Conditions

Field*	Operator*	Type*	Value*
1 [Contact].Mobi...Q	Is changed	Boolean	True

+ Add Row

Conditions*

All of the conditions are met (AND)

Any of the conditions are met (OR)

Customize the logic

> Advanced

- Add a Create a Record action and specify `RecordAction` for the Record Type
- Set field values for the record, pointing to your `Verify_Information` flow and the parent record ID

Select and Define Action

Action Type*
Create a Record

Action Name* ⓘ
Add Verify Info Flow

Record Type*
RecordAction

Set Field Values

Field*	Type*	Value*
Flow	Picklist	Verify_Information
Order	Number	1
Parent Record ID	Field Reference	[Contact].Id
Pinned	Picklist	None

+ Add Row

Activate the process to automatically add the Verify Information flow to the contact when the contact's `MobilePhone` field is changed.

Associate Flows to Records with SOAP

If your business maintains code outside the Salesforce platform, you can use the SOAP API to create, retrieve, update, or delete a `RecordAction` just like any other standard object.


 **Note:** `RecordAction` is available in API version 42.0 and above.

SEE ALSO:

[SOAP API Developer Guide: RecordAction](#)

Associate Flows to Records with Apex


If you want to control how you trigger the creation of a `RecordAction`, you can use Apex to associate flows to records. The `RecordAction` object is exposed as a standard object in Apex and you can trigger it before DML operation, on delete or undelete, and even provide custom error handling.

 **Note:** `RecordAction` is available in API version 42.0 and above.

Here are some scenarios that Apex better accommodates:

- Triggering before Data Manipulation Language (DML) operation, rather than after
- Triggering on delete and undelete DML
- Validating data before the action is run

- Custom error handling
- Partial completion rather than complete failure

 **Example:** This example uses an Apex class and trigger pair to demonstrate how to associate a flow to a newly created account that satisfies a specific criteria. In the class, a method is defined that takes in a list of accounts and creates a new RecordAction for each of them, setting the new account as the RecordId and the FlowDefinition as an active flow. The trigger is called after the insert of an account record, and if the criteria (type is 'Customer') is satisfied, then the class method described above is executed and adds the defined flow to the new account.

Apex Class

```
public class RecordActionHandler {
    public static void addNewCustomerFlow(Account[] accts) {
        RecordAction[] recordActions = new List<RecordAction>();
        for (Account a : accts) {
            RecordAction ra = new RecordAction(RecordId=a.Id,
            FlowDefinition='New_Customer_Flow', Order=1);
            recordActions.add(ra);
        }

        try {
            insert recordActions;
        } catch (DMLException e) {
            System.debug('An unexpected error has occurred: ' + e.getMessage());
        }
    }
}
```

Apex Trigger

```
trigger RecordActionTrigger on Account (after insert) {
    Account[] customerAccounts = new List<Account>();
    for (Account a : Trigger.new) {
        if (a.Type == 'Customer') {
            customerAccounts.add(a);
        }
    }
    RecordActionHandler.addNewCustomerFlow(customerAccounts);
}
```

SEE ALSO:

[Apex Developer Guide](#)

Associate Default Flows to Records with the Guided Action List Component

Use the Guided Action List component to add default flows for when records open from phone screen pops, Live Agents chats, and even when records open from list views or related records. Use the Lightning App Builder to add the Guided Action List component to your page, then edit the component's channel settings. The flows you configure in the Default Actions section are associated to the record when it's opened in context of that channel and no other RecordAction associations exist.

If you have a process set up in Process Builder that also associates flows to records, then the RecordActions created from the process are displayed in the Guided Action List component instead of the flows you configured in the component's channel settings. Associations created in a process override the default channel-specific flows configured in the component.

SEE ALSO:

[Customize Your Lightning Console Pages with the Guided Action List Component](#)

CUSTOMIZE YOUR LIGHTNING CONSOLE PAGES WITH THE GUIDED ACTION LIST COMPONENT

The Guided Action List component lets you display flows to your users and gives them the power to add more flows based on customer needs. The component displays RecordActions associated to the parent record that have new and on going screen flows. Users can also view stages for the current flow that's in progress.


You can use this component to display:

- Flows you've associated to records using a process created in Process Builder or the API
- Default flows you've associated to the record using the component's channel-specific settings

Plan Your User's Experience

First, plan out your console user's experience. When do you want users to see a list of flows? What record will your users be on? What flows do you want displayed? What other information do you want your console users to see on the page?

After you identify the record page you want to edit, create a custom Lightning page for it using one of the console pinned region templates available in the Lightning App Builder. The pinned region page allows you to display the Guided Action List component while the flows open in subtabs.

 **Note:** The Guided Action List component is supported on a limited set of objects in Lightning console apps only. For the full list, see [Supported Apps, Channels, and Objects](#).

Add the Component to Your Page

Now you're ready to add and configure the component.

1. Add the Guided Action List component to your console page.

In the Lightning App Builder, drag the Guided Action List to a pinned region on the page. We recommend adding the component to the pinned left sidebar.

2. Edit the Guided Action List channel settings.

In the properties pane, click **Edit** to configure channel settings for the component.

The Guided Action List provides three channels you can customize.

- Phone

This channel works with Open CTI. Use this channel to specify default flows for when customers call your agents. To use this channel, update your softphone screen pop settings for no matching records and single-matching records.

- Chat

This channel works with Live Agent in Lightning Experience. Use this channel to specify default flows for when agents chat with customers. To use this channel, add the component to the Live Chat Transcript record page.

- Other

Use this channel to specify default flows for when records open from list views or related records.

The Phone and Chat channels display even if you don't have these features in your org.

For each channel you can configure:


Auto-Launch

Specify whether to auto-launch the first flow in the component.

Customize Your Lightning Console Pages with the Guided Action List Component

Default Actions

Select which default flows to display in the list.

 **Important:** The flows you add in the Default Actions section are associated to the record when it's opened in context of the channel and no other RecordAction associations exist. For example, if you have a process set up in Process Builder that also associates flows to records, then the RecordActions created from the process are displayed in the component instead of the flows you configure here.

You can also configure multiple channels for a record page. For example, if you use Open CTI, you can configure default flows for the Phone and Other channel. That way, agents can work with the Action List when a caller's contact record is popped and also when they navigate to a contact record manually, like when they open a record from a list view.

The Available list only displays active screen flows (that use the type `Flow`).

The Selected list provides three regions: Top Pinned, Unpinned, and Bottom Pinned. The pinned regions let you specify flows that you want your users to complete first and last. Users can't remove the flows you add to these regions. The Unpinned region is for flows you want your users to complete during the record's lifecycle. Unlike pinned flow, users can remove these flows from the list.

3. Save your channel settings.


4. Save your Lightning page.

If needed, activate the page and assign it to your console app.

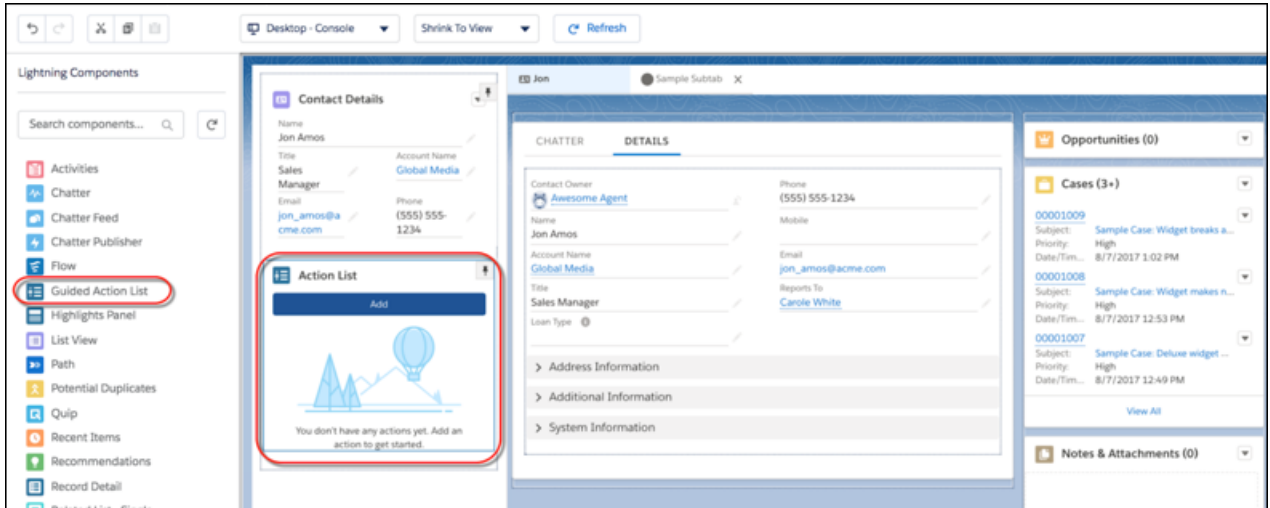
Review Your User Experience

Console users see an Action List with flows associated with the record. Depending on your channel settings, the first flow in the list is auto-launched when the user opens the record page. Keep these things in mind.

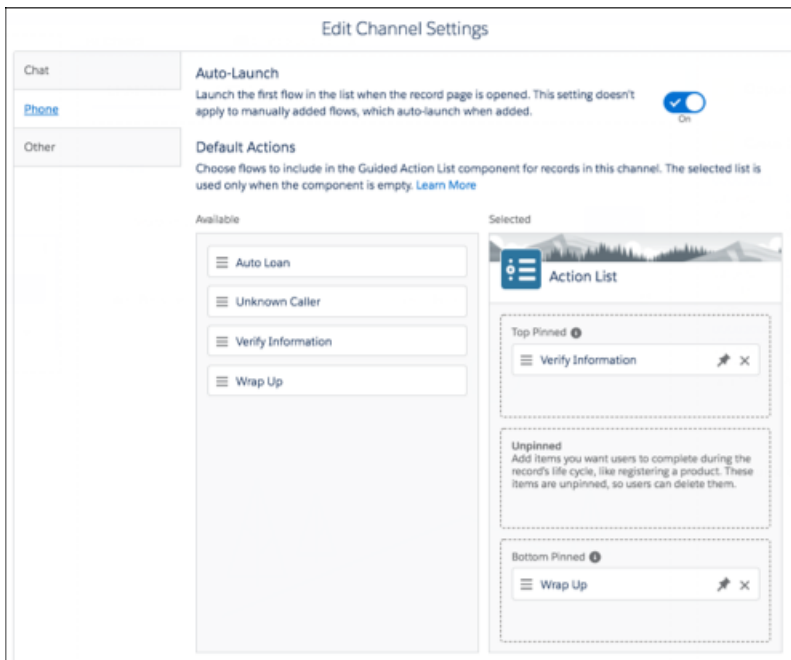
- Flows that users manually add or that get added from other processes, get added above the first flow you specified in the Bottom Pinned region.
- Each flow has a dropdown menu with actions. Users can view a flow, and if the flow is unpinned, remove it from the list.
- Stages display only for in progress flows that are in focus.
- When flows are completed, the subtab is automatically closed. If there are other subtabs open, users are returned to the next subtab. If there are no other subtabs open, users are returned to the workspace tab with the component. Completed flows are grayed out and can't be relaunched. If the page is refreshed, the completed flows are removed from the list.

 **Example:** Here's a sample contact record page for agents in the Service Console. The page uses the Console: Pinned Header and Left Sidebar page template and the Guided Action List component is in the left sidebar.

Customize Your Lightning Console Pages with the Guided Action List Component

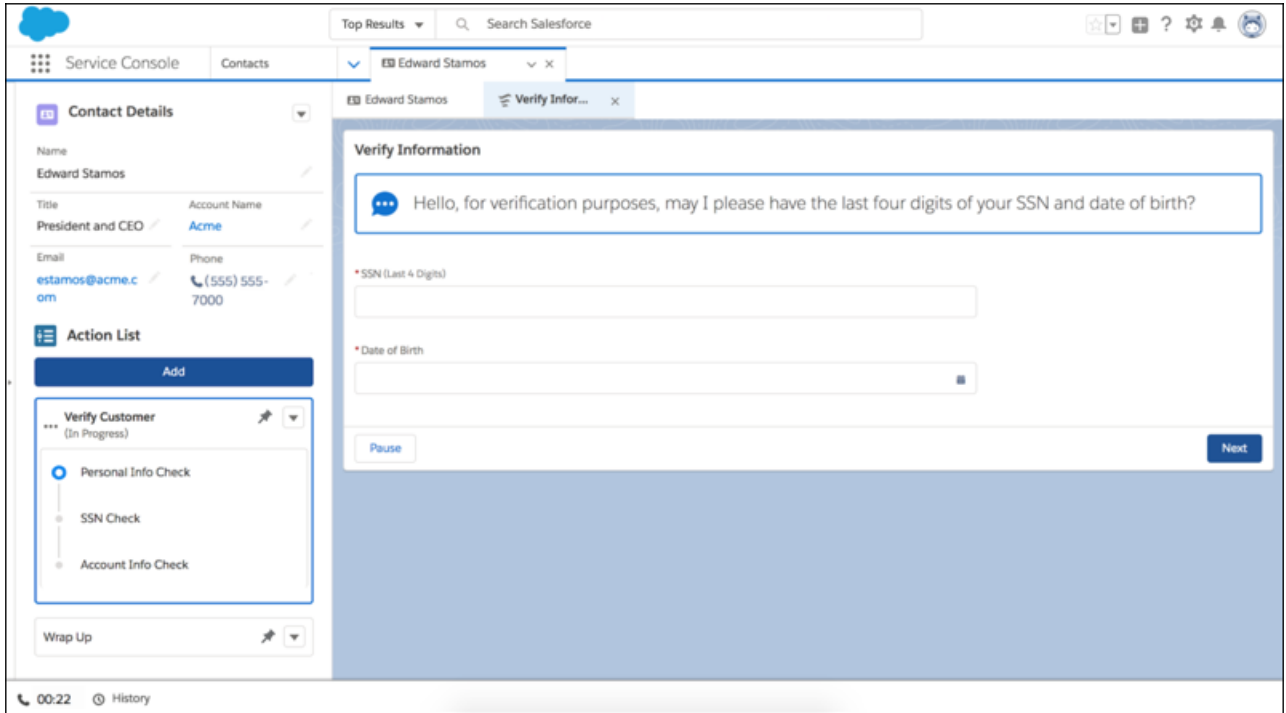


The Verify Information and Wrap Up flows get added to the default flows for the phone channel.



When an agent answers a customer call and works with the contact record, they see the Verify Information and Wrap Up default flows in their Action List. The default flows are displayed here because no other RecordAction associations exist.

Customize Your Lightning Console Pages with the Guided Action List Component



SEE ALSO:

[Salesforce Help: Create and Configure Lightning Experience Record Pages](#)

INTEGRATE LIVE AGENT WITH LIGHTNING GUIDED ENGAGEMENT

Customers who chat with you are often looking for quick and immediate resolutions to their problems. Lightning Guided Engagement helps your agents provide consistent and efficient service. Agents can view your business processes in context of the customer chat because flows are presented as subtabs of the Chat Transcript primary tab. Agents see the appropriate actions to take right up front, without having to manually search for them.

 **Note:** Lightning Guided Engagement supports Live Agent in Lightning Experience, which uses Omni-Channel routing.

To integrate Live Agent with Lightning Guided Engagement, complete the following steps.

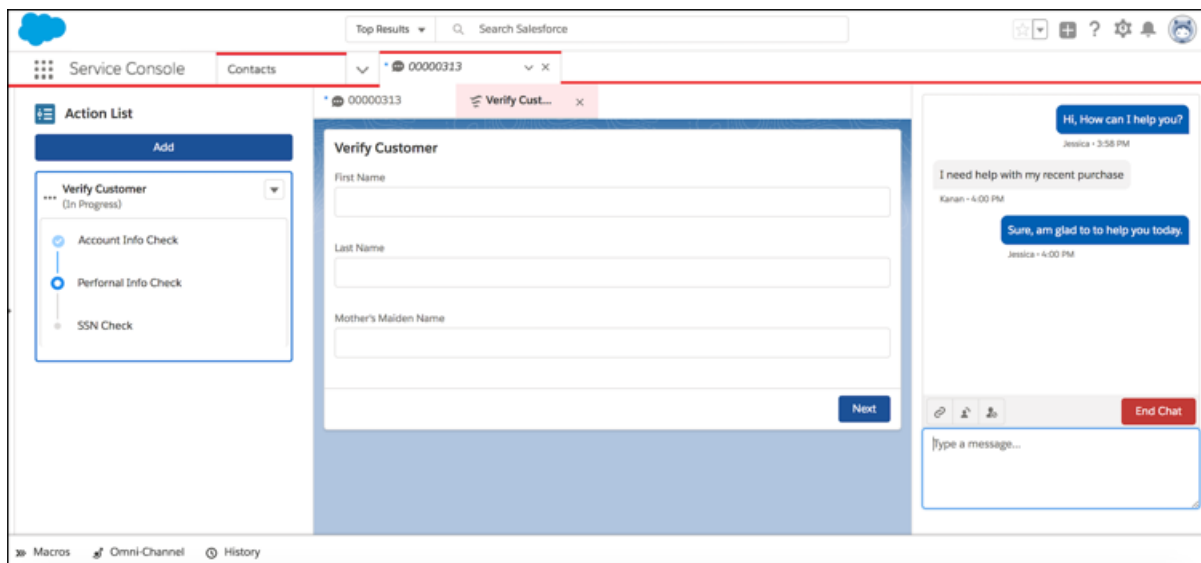
1. Set up flows and processes.

Use Cloud Flow Designer to create individual flows. Then use Process Builder to add processes that associate records with specific flows using the RecordAction object.

2. Create a Lightning console record page.

- a.** In Lightning App Builder, create a record page for the Live Chat Transcript object using the Console: Pinned Left and Right Sidebars page template.
- b.** Add the Guided Action List component to the left column, and place the Chat Body component in the right column.
- c.** Edit the Guided Action List channel settings. Specify which flows you want agents to complete first and last and whether to auto-launch the first flow in the list.

 **Example:** In this example, the Live Agent Transcript page displays the Guided Action List component and the Chat Body component.



SEE ALSO:

[Salesforce Help: Set Up Live Agent in Lightning Experience](#)

INTEGRATE OPEN CTI WITH LIGHTNING GUIDED ENGAGEMENT

Open CTI provides a set of APIs that enables third-party telephony services to integrate with Salesforce. Lightning Guided Engagement takes advantage of three Open CTI methods: `getSoftphoneLayout()`, `screenPop()`, and `searchAndScreenPop()`.


To integrate Open CTI with Lightning Guided Engagement, complete the following tasks:

1. Update your Open CTI implementation to allow incoming calls to screen-pop to flows.

You can also pass call data, such as the phone number or customer name, directly into the flow when it's screen popped.

Use Open CTI API version 42.0 and above with the following methods.

- `getSoftphoneLayout()`
- `screenPop()`
- `searchAndScreenPop()`

 **Note:** Before updating your implementation, make sure that you understand how Open CTI arguments are passed.

Flows can accept input variables, which are also called arguments. The Guided Action List component on a record page automatically attempts to pass the parent record ID to the flow. To use this information, the flow defines an input variable called `recordId` of type `Text`. The Open CTI API allows for more complex variable passing. Single variables and collection variables, like lists and arrays, can be passed through the `flowArgs` parameter available in the `screenPop` and `searchAndScreenPop` methods.

2. [Create flows.](#)

Create an Unknown Caller screen flow for when there's an incoming call and there's no match in Salesforce for the caller. In the Cloud Flow Designer, create a screen flow with fields to verify the caller.


- Add a screen with the fields First Name, Last Name, Phone Number, and Address.
- Add the Record Create data element to create a contact and assign input fields from the screen to the contact fields.
- Set the Unknown Caller screen as your Start Element.

In addition to the Unknown Caller flow, create other flows that you want your users to work with when talking to customers on the phone.

3. Configure screen pop settings in the softphone layout.

From Setup, go to the Softphone Layouts page.

For `No matching records`, select `Pop to flow`. Then select the flow you created for Unknown Callers.

 **Note:** When you use the `Pop to flow` option, flows open as primary tabs in the console.

For `Single-matching records`, select `Pop detail page`. This setting allows the contact record page to be popped.

Integrate Open CTI with Lightning Guided Engagement



4. [Customize the contact record page.](#)

Add the Guided Action List component to the contact page. Use the component's channel settings to configure default flows for the phone channel. That way, when calls match a Salesforce record and users get popped to the contact page, they can see which flows to complete for the call.

SEE ALSO:

[Open CTI Developer Guide](#)

[Salesforce Help: Designing a Custom Softphone Layout](#)

[Salesforce Help: Assigning a Softphone Layout to a User Profile](#)

[Lightning Components Developer Guide: Set Flow Variable Values from a Lightning Component](#)

OTHER RESOURCES FOR LIGHTNING GUIDED ENGAGEMENT

Learn about other resources, like developer guides and Trailhead, to help you get started with Lightning Guided Engagement.

Process Automation

[Trailhead: Automate Your Business Processes with Lightning Flows](#)

[Salesforce Help: Automate Your Business Processes](#)

[Developer Documentation: *Cloud Flow Designer Guide*](#)

[Developer Documentation: *Process Automation Cheatsheet*](#)

App

[Salesforce Help: Salesforce Console in Lightning Experience](#)

[Salesforce Help: Create and Configure Lightning Experience Record Pages](#)

Integrations

[Salesforce Help: Salesforce Call Center](#)

[Salesforce Help: Live Agent Chat](#)