Einstein Conversation Insights Voice Connector Guide

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CONTENTS

INTEGRATE VOICE CONNECTORS WITH EINSTEIN CONVERSATION INSIGHTS

If your sales or service teams are using Dialpad, RingCentral, Aircall, or Amazon Connect, you can connect their customer conversations with Einstein Conversation Insights (ECI) to get transcripts, insights, next steps, and more ECI features.

Amazon Connect when used with Service Cloud Voice with Amazon Connect is supported separately. Use the process here to integrate Amazon Support with ECI without Service Cloud Voice.

Follow these tasks to integrate supported voice providers with Einstein Conversation Insights. The tasks and guidelines outlined here apply to all providers. Each provider also includes unique configuration steps, which are described in separate guides for each provider.

Prepare to Set Up Voice Connectors

Consider the requirements before setting up voice connectors.

Install the Voice Connector App

Download the Voice Connector package from AppExchange or the provided link and install the app.

Launch the Voice Connector App

Open the Voice Connector app from the App Launcher and select the provider you want to connect.

Configure the Voice Connector

Go through the configuration steps described in the linked documents for each connector. These steps are the bulk of the work required for connecting the voice provider.

Assign an Integration User

Assign the integration user for the voice connector app. The signed-in user is assigned as the integration user, so consider creating a separate user dedicated to third-party integrations with Einstein Conversation Insights.

Manage Excluded Numbers for Voice Connectors

Voice calls aren't processed if any meeting attendee is on the excluded number list. Add numbers related to calls that you don't want processed. This step is optional.

Enable Voice Connector Integration

Turn on the integration as the final step. The activation step order differs slightly depending on whether you want to automatically process calls from the past week.

Guidelines for Starting to Use Voice Connectors

Make sure sales and service teams record calls to start using Einstein Conversation Insights. We recommend testing a call to make sure everything's set up correctly.

Troubleshooting Voice Connector Issues

Check common issues as you troubleshoot voice connector issues.

Disable Voice Connector Integration

Turn off the integration if you don't want to give Einstein Conversation Insights access to the voice connector. Make sure you also stop the scheduled jobs related to the connector.

Prepare to Set Up Voice Connectors

Consider the requirements before setting up voice connectors.

General Setup Considerations

- This setup process should be completed by a Salesforce admin with the appropriate permissions.

- It's a Salesforce best practice to use a separate user to complete the integrations between ECI and your voice provider. You can create a user with Salesforce admin permissions dedicated to this purpose in advance, and then log in as this user for the configuration tasks.

- Admin access to the individual voice connectors is also required during the implementation process. Make sure you have that information available if it's handled by someone else.

- Depending on the voice connector, you sometimes need to email the related vendor, which can add time to the implementation process.

- To enable variable phone number support, additional steps are required. For more information see, ECI Voice Connector Variable Phone Number Support.

Table 1: User Permissions

Salesforce Admin or User Task	Preferences and Permissions Required
To set up Einstein Conversation Insights	Customize Application, Modify All Data, Assign Permission Sets, and Manage Users
To complete integration tasks	Conversation Insights Integration User
To use Einstein Conversation Insights for Sales	Sales Engagement Conversation Insights, Sales Cloud Bundle Included, Einstein Conversation Insights Included, OR Conversation Insights for Sales permission set
To use Einstein Conversation Insights for Service	Conversation Insights for Service permission set

Other Setup Considerations

- Retrieving call data from third-party CTI provider APIs can include limitations around how many calls are supported. Check with your provider for any limitations.

- Calls are pulled in real time from each provider's API. Call are also pulled in a batch update every hour for the first day if they're not pulled in real-time. For calls created more than a day ago, use the Error Handling tab to retry processing. For Dialpad, batch updates are also run every hour, though there can be a delay of 24 hours before a call is pulled in.

- ECI doesn't record calls, and a call being recorded is necessary in order to be processed by ECI.

- If your CTI supports mono call recordings only, instead of stereo, then enable the Optimal Speaker Separation setting to produce transcripts and fully process calls. This setting can be enabled in Setup, in General Settings under Einstein Conversation Insights.

- For Dialpad, we recommend contacting Dialpad Support about enabling auto recording capture prior to enabling the connector integration. Otherwise, only calls that are manually recorded by a rep are processed.

- For Amazon Connect, closely follow the configuration documentation. The Salesforce / Amazon Connect integration must be set up in a specific way to ensure the correct data exists to process calls.

- If a voice connector is disabled, delete any related scheduled jobs before enabling the connector again. If the scheduled jobs aren't deleted, you can't enable the connector again.
- For Aircall, Dialpad, and RingCentral, you can process calls that were made over the past seven days immediately after turning on the voice connector. This enables you to test and work with call insights, transcripts, and other features right away.

For a full list of considerations related to Einstein Conversation Insights, see Salesforce Help.

Install the Voice Connector App

Download the Voice Connector package from AppExchange or the provided link and install the app.

1. Go to the AppExchange listing or this page and download the Voice Connectors for Einstein Conversation Insights package.

2. After the package has been downloaded, open it and select **Install for All Users**.

3. Install the package.
   You receive an email from Salesforce confirming that the package was installed.

EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

USER PERMISSIONS

To enable Einstein Conversation Insights:
- Customize Application

Launch the Voice Connector App

Open the Voice Connector app from the App Launcher and select the provider you want to connect.

1. From the App Launcher, enter `Voice Connector` in the Search box, and then select **Voice Connector**.

2. Select the voice provider you want to connect.

3. Agree to the terms and conditions.

Configure the Voice Connector

Go through the configuration steps described in the linked documents for each connector. These steps are the bulk of the work required for connecting the voice provider.

1. From the **Configure Named Credentials** step, click **Configure Named Credential**.

   The configuration guide for each voice provider appears.

2. Follow the instructions in the guide. The current configuration guide for each voice provider is also available here:

   a. Aircall Configuration Guide

   b. Amazon Connect Configuration Guide

   c. Dialpad Configuration Guide

   d. RingCentral Configuration Guide

   These instructions involve more than configuring the named credentials and are different for each connector.

Assign an Integration User

Assign the integration user for the voice connector app. The signed-in user is assigned as the integration user, so consider creating a separate user dedicated to third-party integrations with Einstein Conversation Insights.

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.

You likely created a dedicated integration user based on the guidelines in the connector-specific configuration guides. Use that user for this task.

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

2. Make sure an ECI access permission set and the Conversation Insights Integration User permission set are assigned to the integration user. Assign the System Administrator profile. The user also needs **API Enabled** enabled and access to the Voice Call object.

   For Amazon Connect, if you're using a separate integration user for your Amazon Connect integration, this user also needs ECI access.

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

4. From the Assign Your User as the Integration User step, click **Assign Integration User**.

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Manage Excluded Numbers for Voice Connectors

Voice calls aren't processed if any meeting attendee is on the excluded number list. Add numbers related to calls that you don't want processed. This step is optional.

1. Click the Excluded Numbers tab, or from the Exclude Phone Numbers from Data Capture step, click **Manage Excluded Numbers**.

2. Click **Add**.

3. Add any phone numbers you want to exclude from data capture.

4. Click **Exclude**.

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To enable Einstein Conversation Insights:
- Customize Application

Enable Voice Connector Integration

Turn on the integration as the final step. The activation step order differs slightly depending on whether you want to automatically process calls from the past week.

You can automatically process voice calls associated with the connector from the past 7 days. This feature isn't available with Amazon Connect.

If you don't want to process voice calls, do steps 2–3 first, and then step 1.

1. From the Enable Integration step, turn on the toggle.

2. From Setup, enter **Einstein Conversation Insights** in the Quick Find box, and then select **General Settings**.

3. Turn on the voice connector you set up.

   📝 Note: For Dialpad, we recommend that you contact Dialpad Support about enabling auto recording capture prior to enabling the voice connector integration. For more information, see the Dialpad Configuration Guide.

Guidelines for Starting to Use Voice Connectors

Make sure sales and service teams record calls to start using Einstein Conversation Insights. We recommend testing a call to make sure everything's set up correctly.

Assign Permissions/Licenses

To get started, make sure users are using the voice providers appropriately. Users must have an Einstein Conversation Insights permission set assigned.

Set Up User ID/Phone Number Matching

When the Voice Connector package is installed, three new fields are automatically added to each Salesforce user profile (Dialpad User Identifier, Aircall User Identifier, Ringcentral User Identifier). These fields must be populated with the user ID that Salesforce receives from each call record. Please populate the corresponding field, based on which connector you use, for each user.

Considerations for User ID/Phone Mapping

For new phone calls that are received, the Voice Connector app matches each call to a Salesforce user in the following ways:

For Aircall, RingCentral, and Dialpad

1. Uses ID from each phone call and matches to the corresponding Salesforce user profile fields (Aircall User Identifier OR RingCentral User Identifier OR Dialpad User Identifier).

2. If no match is made, uses corresponding to/from phone number from call and matches to the corresponding Salesforce user profile field (Phone).

3. If no match is made, call has no identified user, and call is not processed.

For Amazon Connect

1. Uses (Agent Login Username) from the Contact Channel Trace record and matches against Salesforce user profile field (Amazon Connect Username).

2. If no match is made, matches to Salesforce user profile field (Email).

3. If no match is made, uses corresponding to/from phone number from call and matches to the corresponding Salesforce user profile field (Phone).

4. If no match is made, call has no identified user, and call is not processed.

If the same call is matched to multiple users, the user with the most recent Last Modified Date is associated with the related call.

Recorded calls are then processed automatically if they meet these criteria.

- Voice calls are longer than 10 seconds. Calls less than 10 seconds long are often not processed depending on the recording provider.

- Calls include at least two participants, with one participant not internal. Meetings with only internal attendees or meetings that include someone on the excluded list aren't added to Salesforce.

A temporary object, VC Call, is used to process calls. If a VC Call record isn't created for the call, something went wrong with the integration. If a VC Call record is created, but the call isn't processed, an issue with the user, assignment, or phone number exists.

Call recordings are available as soon as they're uploaded to Salesforce, though it can take time to analyze calls based on the size of the recording.

Calls are pulled in real time from each provider's API. Call are also pulled in a batch update every hour if they're not pulled in real-time. For Dialpad, batch updates are also run every hour, though there can be a delay of 24 hours before a call is pulled in.

Troubleshooting Voice Connector Issues

Check common issues as you troubleshoot voice connector issues.

For a full list of considerations related to Einstein Conversation Insights, see the Salesforce Help.

Feature Enablement and Access Issues

- Verify that the voice connector is enabled in the Voice Connector app and in the Einstein Conversation Insights page in Setup.

- Verify that the Voice Connector Permission and Conversation Insights Integration User are assigned to the Voice Connector Guest User.

- Verify that the Salesforce site is active. You can check that the site exists and is active in the Sites page in Setup.

- Verify that the named credentials are properly authenticated. You can check this from the Named Credentials page in Setup. Check that the Authentication Status field is Authenticated and that the scope is accurate.

- Verify that the Auth. Provider settings are correct. You can check this from the Auth. Providers page in Setup. For Dialpad and RingCentral, make sure the Provider Type is Open ID Connect and these checkboxes are selected.

  - Send Access Token in Header

  - Include Consumer Secret in SOAP API Responses

  - Send client credentials in the header

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Available with Enablement, which is available for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

VCCall Issues

If the VCCalls aren't being assigned to a user, verify instructions above for user matching, using the Salesforce user profile compared to the data received from each phone call.

If you're still encountering VCCall issues, check the VCLog. You can view the log from a VCCall record, under the Related tab, under VCLog. Look for useful debugging information there.

Error Handling

If users aren't seeing their calls in Salesforce, you can use the Error Handling tab to identify and try to reprocess the call.

From the Voice Connector app, select the Error Handling tab to access the page. It's possible to retrieve a list of voice calls by the user within a certain date or retrieve individual calls by the ID.

ECI automatically tries to process calls that weren't initially processed successfully. For calls created more than a day ago, use the Error Handling tab to retry processing.

Disable Voice Connector Integration

Turn off the integration if you don't want to give Einstein Conversation Insights access to the voice connector. Make sure you also stop the scheduled jobs related to the connector.

1. From the App Launcher, enter `Voice Connectors` in the Search box, and then select **Voice Connectors**.

2. Select the voice connector you want to disconnect.

3. From the **Enable Integration** step, turn off the toggle.

4. From Setup, enter `Einstein Conversation Insights` in the Quick Find box, and then select **General Settings**.

5. Turn off the voice connector you want to disconnect.

6. Enter `Scheduled Jobs` in the Quick Find box, and then select **Scheduled Jobs**.

7. Delete the jobs related to the voice connector.

   If the scheduled jobs aren't deleted, you can't enable the connector again.

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