



Altocloud Administrator's Guide

Prepare Architect components

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Prepare an Architect workflow to integrate Altocloud with a third-party system.

Configure the following permissions in Genesys Cloud:

- **Architect > Flow > UI**
- **Architect > Flow > Search**

Campaign parameters

To build an integration using the Architect flow action in Altocloud, you must use an Architect flow of the **Workflow** type. The workflow allows you to execute an action via the REST API.

The REST request requires certain parameters:

- Required parameters for Salesforce Lead Creation and Campaign Attribution integration

Prepare the workflow

The image illustrates the process of creating a workflow in the Architect interface. It is divided into three main sections:

- Left Panel (Navigation):** A sidebar with the 'Architect' logo at the top. Below it, a 'Flows : Workflow' dropdown menu is expanded, showing options: 'Inbound Call', 'In-Queue Call', 'Outbound Call', 'Secure Call', 'Inbound Chat', 'Inbound Email', 'Survey Invite', and 'Workflow' (which is highlighted in blue).
- Top Panel (Action Bar):** A horizontal bar with 'Flows : Workflow' dropdown, 'Prompts' dropdown, and 'Dependency Search' text. Below this bar is a row of action buttons: '+ Add', 'Open', 'Delete', 'Unlock', 'Versions', and 'Refresh'.
- Bottom Panel (Form):** A 'Create Flow' modal form with the following fields:
 - Name:** A text input field with the placeholder 'Name for flow'.
 - Description:** A text input field with the placeholder 'Description for flow'.
 - Default Language:** A dropdown menu currently set to 'English (United States)'.
 - Division:** A dropdown menu currently set to 'Home'.At the bottom right of the form are 'Cancel' and 'Create Flow' buttons.

Arrows indicate the flow of the process: from the 'Workflow' option in the left panel to the '+ Add' button in the top panel, and then down to the 'Create Flow' form.

Important

Always use the Workflow flow type.

To prepare the workflow:

1. Create a new workflow.
 - From the **Flows** list, select **Workflow**.
 - Click **Add** and specify a name.
 - Update the other fields as you need to.
2. Import the integration-specific workflow:
 - Required workflow for the Salesforce Lead Creation and Campaign Attribution integration
3. Update the data action referential integrity constraints.
4. Save the workflow.
5. Publish the workflow.

Update referential integrity constraints

The screenshot displays the Salesforce Flow Builder interface. On the left, a workflow diagram titled "66 Create Salesforce Lead if it Doesn't Exist" is shown. The flow starts with a "Start" node, followed by a "Call Data Action" node (67) with a red border and an error message: "The selected data action could not be found." This node branches into three paths: "Success", "Failure", and "Timeout". The "Success" path leads to an "End Task" (72) with output path "ExistingLead". The "Failure" path leads to another "Call Data Action" node (68) with a red border and the same error message, which then branches into "Success", "Failure", and "Timeout" paths. The "Success" path leads to an "End Task" (73) with output path "NewLead". The "Failure" path leads to an "Update Data" node (89) with error reason "1: Flow.errorReason = FailedToCreateLead". The "Timeout" path leads to a "Drag action here" placeholder. On the right, the configuration panel for the "67 Call Data Action" is shown. The "Name" field is "Call Data Action". The "Category" is "Salesforce Data Actions". Under the "Data Action" section, "Journey Salesforce Get Lead By Email" is selected and circled in red. Below this, there is a checkbox for "Use action's suggested timeout" which is checked. The "Inputs" section shows "EMAIL" with the value "Flow.customerEmail". The "Success Outputs" section shows "Id" with the value "Flow.leadId".

Predefined data actions are built to work in the Altocloud development environment. To make them work in your environment, you must update the referential integrity constraints.

For each data action, do the following:

1. In the workflow, select a data action with a red border. (The red indicates the referential integrity problem.)
2. Under **Data Action**, select the name of the corresponding data action.
3. Repeat these steps for every data action with a red border.