Dextara
A DATAMATICS Company

Case Study

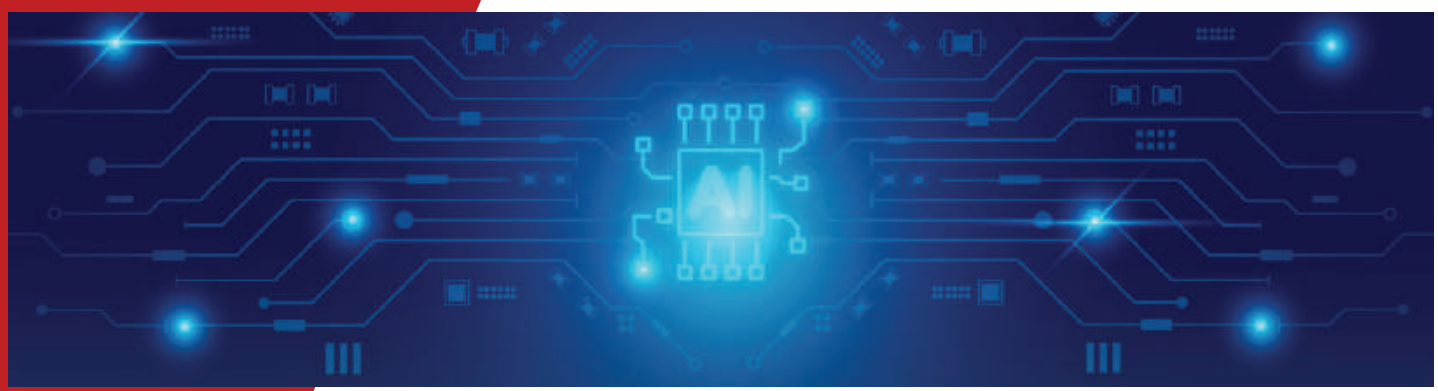
Explore How Dextara Developed AI Support Engine on Salesforce

About Client

Our client is a leading player in offering artificial intelligence (AI) solutions and platforms to Enterprises to optimize their customer experiences effortlessly.

The Problem Statement

The Client has a proprietary AI Service engine (built outside the Salesforce ecosystem) to assist support agents in resolving end-customer issues. To extend the functionalities of this AI Service engine and develop the necessary components to list this engine as a Managed Package on Salesforce AppExchange, the Client opted to integrate Salesforce Service Cloud for its flexibility, scalability, and security standards and chose Dextara for our expertise as a Product Development Outsourcer and Salesforce Implementation Partner.



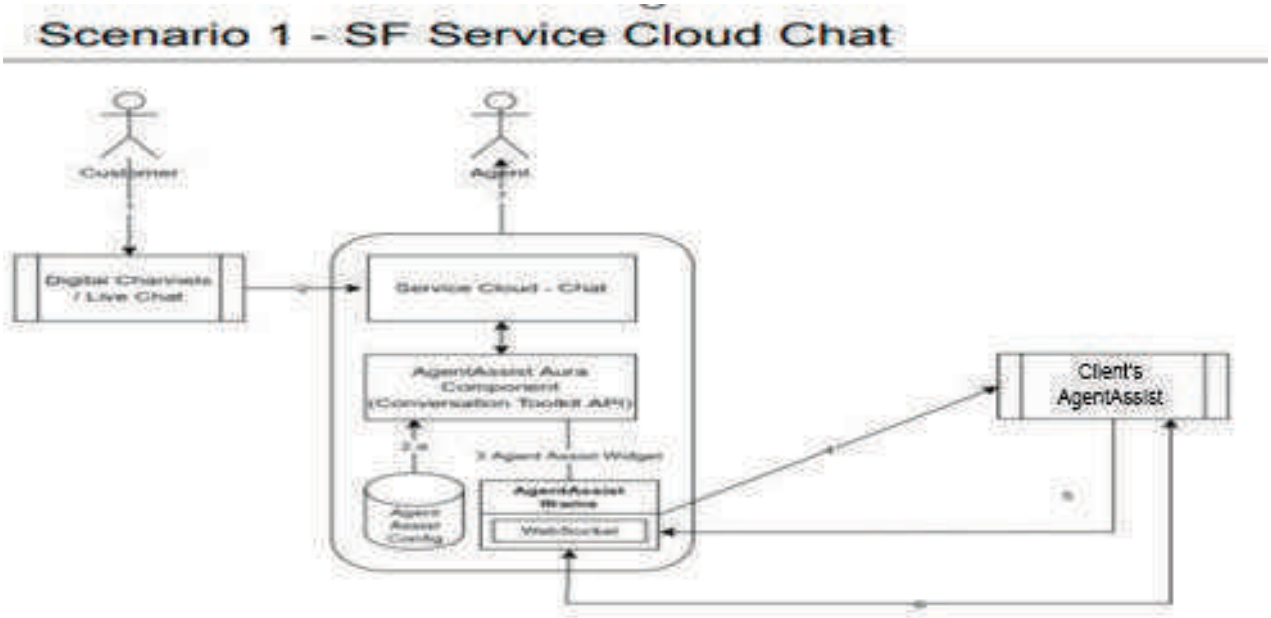
Our Solution

Dextara developed the AI Service Engine Integration Suite and event listener JavaScript web components to

- facilitate seamless communication and data exchange between the two platforms and
- enable smooth integration between the platforms and publish these components as a Managed Package on Salesforce AppExchange.

The Dextara team implemented and integrated Salesforce Service Cloud and the Client's AI Service engine by incorporating chat and voice features to enhance the communication channels.

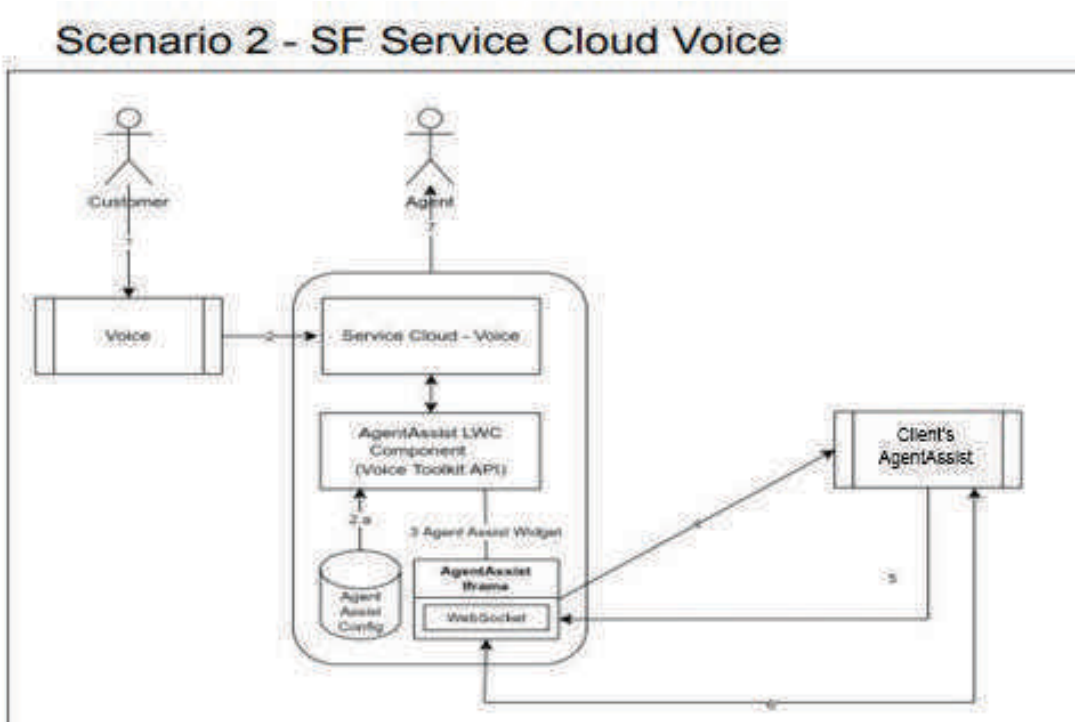
Client's AI Service Engine (AgentAssist) Integration with Salesforce



In this scenario, when a customer initiates a chat request in Service Cloud, the AgentAssist Aura Component is activated. This component serves as a bridge between Service Cloud chat and the Client's AgentAssist Engine. The process involves:

- Retrieving AgentAssist configuration, including client ID, client secret, JWT token, bot ID, and the AgentAssist JavaScript widget URL.
- Listening to incoming chat messages through an event listener using the conversation toolkit API callback.
- Creating an iframe for the AgentAssist Widget using the obtained widget URL.

- Sending the encrypted token to Client's AgentAssist backend for validation.
- Rendering the AgentAssist JavaScript widget based on token validity.
- Establishing a WebSocket connection between the AgentAssist JavaScript widget and the bot.
- Routing incoming chat messages to the AgentAssist backend for processing and obtaining appropriate responses.
- Presenting the obtained responses to the agent, enabling interaction with the customer.



In this scenario, when a customer calls the contact center phone number and the Agent accepts the call via Service Cloud Voice, the AgentAssist Aura Component is triggered. This component serves as a link between Service Cloud Voice and Client's AgentAssist, executing the following steps:

- Retrieving AgentAssist configuration, including client ID, client secret, JWT token, bot ID, and the AgentAssist JavaScript widget URL.
- Listening to incoming transcripts from customers using an event listener implemented through the voice toolkit API callback.
- Creating an iframe for the AgentAssist Widget using the obtained widget URL.
- Sending the encrypted token to Client's AgentAssist backend for validation.
- Rendering the AgentAssist JavaScript widget based on token validity.

- Establishing a WebSocket connection between the AgentAssist JavaScript widget and the bot.
- Routing incoming chat messages to the AgentAssist backend for processing and obtaining appropriate responses.
- Presenting the obtained responses to the agent, enabling interaction with the customer during the phone call.

Challenges Faced and Overcome

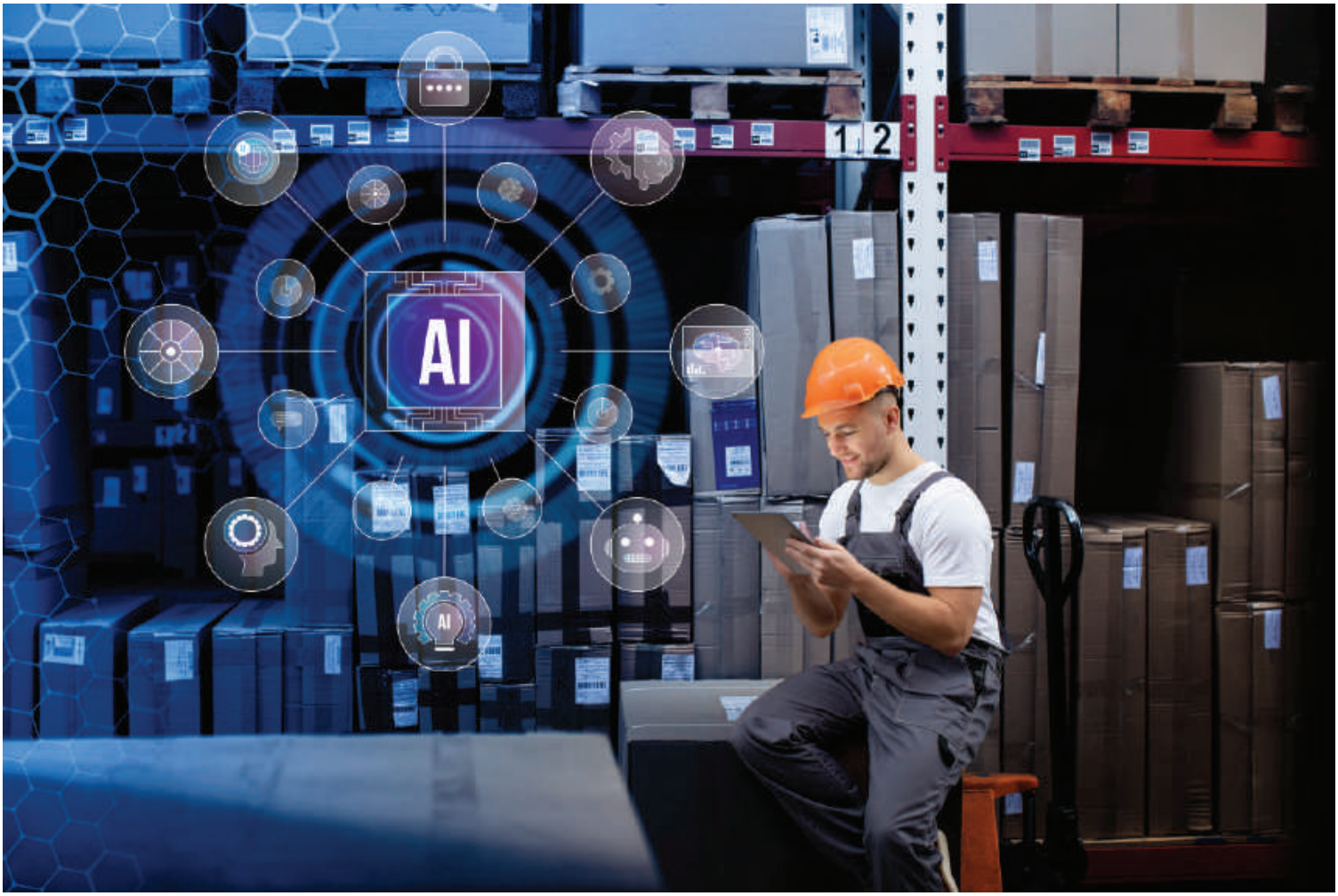
The Dextara team faced several challenges while developing the event listener JavaScript web components to bridge Salesforce and AI Service Engine, besides ensuring secure communication with the Client's AI Service engine (as traditional authentication methods raised security concerns, prompting the Dextara team to explore alternative solutions, during the integration process).

The Dextara team leveraged the Windows Events system as a publish-subscribe (pub-sub) model. It enabled seamless communication between Salesforce Service Cloud and the Client's AI engine, ensuring security and efficient data exchange. Dextara's innovative solution significantly reduced development effort and accelerated time-to-market for the Client.

Outcomes

- **Easy Issue Resolution:** Service agents can now leverage integrated AI capabilities and resolve customer issues efficiently in less time.
- **Comprehensive view of Customer:** The service agents can use the unified platform to respond, track, and follow customer interactions.
- **Enhanced Customer Engagement:** The introduction of chat and voice features has enriched the communication channels, enabling support agents to offer more personalized and effective assistance, delivering a superior customer experience.
- **Gained Efficiency:** Integrating the Client's AI Service engine with Salesforce streamlined support agent workflows, enabling faster case resolution and improved customer support efficiency.
- **Expanded Market Reach:** By accessing Salesforce's customer base, the Client expanded their market reach, gaining a competitive edge among AI-driven service industries.
- **Ensuring Security Compliance:** Dextara meticulously ensured that the Client's product met specified security requirements and standards by Salesforce before listing it on the AppExchange with thorough testing and validation to ensure data security, compliance with Salesforce security guidelines, and protection against potential vulnerabilities.

- **Product Listing on Salesforce AppExchange:** Dextara successfully developed and listed the Client's AI Service engine on the Salesforce AppExchange and made it available for Salesforce users on the Salesforce AppExchange.



50+
Clients

4.9/5
★★★★½
AppExchange

600+
Active Projects

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