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# Web Services and Applications Configuration Guide

Gplus Adapter for Salesforce Configuration Options

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# Gplus Adapter for Salesforce Configuration Options

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The Gplus Adapter for Salesforce has its own configuration options that you set in the **[crm-adapter]** section and it also takes advantage of some of the Workspace Web Edition options, set in the **[interaction-workspace]** section. As with Workspace Web Edition, you can apply configuration options to the **Web Services Cluster Application**, Agent Group, Person, and so on — see **Configuration and Administration by Using Options and Annexes** for details about the option override order.

### Gplus Adapter for Salesforce options

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#### click-to-dial.preprocessing-rules

- **Default Value:** `default`
- **Valid Values:** `default`, `none`, or a comma-separated list of pre-processing rule section names
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies the pre-processing rules to apply to the phone number before making a dial request. If the option is not defined, the default rule is applied. The possible values are:
  - `default` — applies the default rules:
    - If the phone number is 10 digits, add +1.
    - If the phone number is 11 digits, add +.
    - If the phone is greater than 11 digits and doesn't start with 011, add 011.
  - `none` — turns off pre-processing.
  - `<pre-processing-rule-section-name(s)>` — name of the pre-processing rule section(s). Within a rule section, you **must** set the following key/value pairs:

- **expression** — A regex that defines the condition to be matched.
- **prefix** — The prefix to be added to the phone number if the expression is matched.
- **description** — A short description of the rule.

Here's how the default rules would be configured:

```
[crm-adapter]
click-to-dial.preprocessing-rules: preprocessing-rule-10-digit-US-numbers,
preprocessing-rule-11-digit-US-numbers, preprocessing-rule-international-numbers

[preprocessing-rule-10-digit-US-numbers]
expression: ^[0-9]{10}$
prefix: +1
description: "If it is 10 digits add +1"

[preprocessing-rule-11-digit-US-numbers]
expression: ^[0-9]{11}$
prefix: +
description: "If it is 11 digits, add +"

[preprocessing-rule-international-numbers]
expression: ^(?:011)[0-9]{8,}$
prefix: 011
description: "If it is greater than 11 digits and doesn't start with 011, add 011"
```

### Important

The adapter runs each rule in sequence until it finds a match and adds the prefix. No further rules are executed.

### feedback.submit-after-disconnect

- **Default Value:** never
- **Valid Values:** always, prompt, never
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** This option controls how the adapter handles the submission of feedback logs after the adapter is disconnected from GWS. When set to always, the adapter always submits feedback logs without asking the user. When set to prompt, the user is prompted to allow the Adapter to submit feedback logs. When set to never, no feedback logs are submitted.

### salesforce.activity-log.enabled-call-types

- **Default Value:** Inbound, Outbound, Internal, Consult
- **Value Values:** A comma-separated list of call types (Inbound, Outbound, Internal, Consult) or an empty value to disable all.
- **Changes Take Effect:** When the session is started or restarted.

- **Salesforce modes:** Console, Lightning
- **Description:** Specifies the call types the adapter should create activity history entries for in Salesforce.

#### salesforce.activity-log.enabled-chat-types

- **Default Value:** Inbound, Consult
- **Value Values:** A comma-separated list of chat types (Inbound, Consult) or an empty value to disable all.
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies the chat types the adapter should create activity history entries for in Salesforce.

#### salesforce.activity-log.field-mapping

- **Default Value:** None
- **Valid Values:** The name of a configuration section that contains the mapping.
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies the name of the configuration section where the mapping is defined. In that section, each key must correspond to a UserData key the adapter should look for and each value must correspond to the name of the custom activity field in Salesforce. If this option is not defined or has a blank value, no custom values are added when the adapter creates the activity history. Also, if a given key is not present in the UserData or does not have a value, the adapter doesn't include it in the activity creation request.

Here's an example of how to configure the mapping:

```
[crm-adapter]
salesforce.activity-log.field-mapping=my-field-mappings

[my-field-mappings]
firstName=first_name__c
lastName=last_name__c
```

#### salesforce.chat.include-transcript-in-desc

- **Default Value:** true
- **Valid Values:** true, false
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies whether the adapter saves the chat transcript as part of the activity description in Salesforce.

#### salesforce.chat.transcript-custom-field-name

- **Default Value:**
- **Valid Values:** Name of a custom field in Salesforce
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies the name of a **custom activity field in Salesforce**. If set, the adapter saves the chat transcript to this field in Salesforce. **Note:** Salesforce Lightning Experience supports only 255 characters for Text fields. If you configure the Text fields to store the chat transcripts and set the length of characters as 255, only the first 255 characters of the chat transcript will be saved in the Activity History and the remaining transcript will be truncated. However, you can still view the **Details** and **Case Data** of the chat interaction in the **My History** tab in Agent Desktop. Whereas, if you configure the Text field's character length with a value less than 255, then, an activity might not get created in Salesforce if the chat transcript exceeds the configured character length.

#### salesforce.email.include-body-in-desc

- **Default Value:** false
- **Valid Values:** true, false
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** When set to true, includes the text version of the email body in the activity description in Salesforce. The email body is saved only for inbound emails and outbound replies.

#### salesforce.enable-in-focus-page-transfer

- **Default Value:** false
- **Valid Values:** true, false
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies whether to update the call data with the ID of the object the agent is looking at in Salesforce when performing a voice or chat conference or transfer. If set to true, the agent receiving the voice or chat conference or transfer gets a screen pop for the most relevant object.

#### salesforce.user-data.object-id-key

- **Default Value:**
- **Valid Values:** A valid user key name to store the Salesforce object id. For example: sf\_object\_key
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies the key the adapter uses when saving the ID of the focused Salesforce object to attached data.

#### salesforce.user-data.object-name-key

- **Default Value:**
- **Valid Values:** A valid user key name to store the Salesforce object name. For example:  
sf\_object\_name
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies the key the adapter uses when saving the name of the focused Salesforce object to attached data.

#### salesforce.user-data.object-type-key

- **Default Value:**
- **Valid Values:** A valid user key name to store the Salesforce object type name. For example:  
sf\_object\_type
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies the key the adapter uses when saving the type of the focused Salesforce object to attached data.

#### screenpop.enable-for-internal-calls

- **Default Value:** true
- **Valid Values:** true, false
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies whether the adapter initiates screen pops for internal calls.

#### screenpop.id-key-regex

- **Default Value:**
- **Valid Values:** A regular expression that matches a UserData key.
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies a regular expression pattern used to match a UserData key. This key's value should contain the ID of an object to screen pop in Salesforce. As with the existing screen pop behavior using the "id\_" prefix, if multiple matching keys are present, the adapter only uses the first one. If this option isn't defined, the adapter uses the existing "id\_" prefix logic.

#### screenpop.include-ani-in-search

- **Default Value:** true

- **Valid Values:** true, false
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies whether the ANI is used in the screen pop search.

### screenpop.on-ringing

- **Default Value:** false
- **Valid Values:** true, false
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies whether the adapter initiates a screen pop in Salesforce when the call is ringing. If not set or false, the adapter initiates a screen pop when the call is established.

### screenpop.chat.on-invite

- **Default Value:** false
- **Valid Values:** true, false
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies whether the adapter initiates a screen pop in Salesforce immediately after displaying the chat invite notification. If the option is not set or false, the adapter initiates a screen pop only when the agent accepts the chat invite.

### screenpop.email.on-invite

- **Default Value:** false
- **Valid Values:** true, false
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies whether the adapter initiates a screen pop in Salesforce immediately after displaying the email invite notification. If the option is not set or false, the adapter initiates a screen pop only when the agent accepts the email invite.

### screenpop.openmedia.on-invite

- **Default Value:** false
- **Valid Values:** true, false
- **Changes Take Effect:** When the session is started or restarted.



- **Salesforce modes:** Console, Lightning
- **Description:** Specifies whether the adapter initiates a screen pop in Salesforce immediately after displaying the open media invite notification. If the option is not set or false, the adapter initiates a screen pop only when the agent accepts the open media invite. This option supports the open media items configured in the [openmedia.workitem-channels](#) option.

#### screenpop.preprocessing-rule

- **Default Value:** default
- **Valid Values:** default, none, or a pre-processing rule section name.
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies the pre-processing rule to apply to the ANI before showing the screen pop. If the option is not defined, the default rule is applied. The possible values are:
  - default — applies the default rule, which removes +1 from the beginning of the ANI.
  - none — turns off pre-processing.
  - <pre-processing-rule-section-name> — name of the pre-processing rule section. Within this rule section, you **must** set the following key/value pairs:
    - expression — A regex that defines the condition to be matched.
    - replacement — The string to replace the matched substring. If you set this value to empty, this removes the matched section.
    - description — A short description of the rule.

Here's how the default rule would be configured:

```
[crm-adapter]
screenpop.preprocessing-rule: preprocessing-rule-remove-prefix

[preprocessing-rule-remove-prefix]
expression: ^\\+1
replacement:
description: "Remove +1 from the beginning of the number"
```

#### screenpop.search-key-regex

- **Default Value:**
- **Valid Values:** A regular expression that matches one or more UserData keys.
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies a regular expression pattern used to match one or more UserData keys. The values for these keys are used to build the search and screen pop expression in Salesforce. If this option is not defined, the adapter uses the existing "cti\_" prefix logic.

### screenpop.transfer-object-key

- **Default Value:** id\_transfer\_object
- **Valid Values:** A valid key
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies the custom UserData key the adapter should use for the object ID of the focused page in Salesforce.

### templates.salesforce.<interaction type>.<salesforce argument>

- **Default Value:**
- **Valid Values:** A string with custom template variables wrapped in "{" and "}"
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes:** Console, Lightning
- **Description:** Specifies the custom template the adapter should use when creating the subject field in a Salesforce activity. You can specify two arguments in the option name:
  - <interaction type> is either inbound-voice, outbound-voice, transfer-voice, chat, or email.
  - <salesforce argument> is subject (the adapter currently supports only this argument).

Set the value of this option to a string that contains custom template variables wrapped in "{" and "}". For details, see [Custom templates](#).

## Workspace Web Edition options

The following Workspace Web Edition options also apply to the Gplus Adapter for Salesforce.

Agent Status	<ul style="list-style-type: none"> <li>• agent-status.enabled-actions-by-channel</li> <li>• agent-status.enabled-actions-global</li> <li>• agent-status.not-ready-reasons</li> </ul>
Application	<ul style="list-style-type: none"> <li>• system.cometd.timeout</li> <li>• system.log-level</li> </ul>
Chat	<ul style="list-style-type: none"> <li>• <i>No results</i></li> <li>• privilege.chat.can-one-step-conference</li> </ul>

	<ul style="list-style-type: none"><li>• <code>privilege.chat.can-one-step-transfer</code></li><li>• <code>privilege.chat.can-release-consultation</code></li><li>• <code>privilege.chat.can-two-step-conference</code></li><li>• <code>privilege.chat.can-two-step-transfer</code></li><li>• <code>privilege.chat.can-use</code></li></ul>
Contact Center Statistics	<ul style="list-style-type: none"><li>• <code>statistics.displayed-statistics</code></li><li>• <code>statistics.refresh-time</code></li><li>• <code>statistics.routing-points</code></li></ul>
Expression	<ul style="list-style-type: none"><li>• <code>expression.url</code></li></ul>
Interaction	<ul style="list-style-type: none"><li>• <code>interaction.case-data.enable-hyperlink</code></li><li>• <code>interaction.case-data.format-business-attribute</code></li><li>• <code>interaction.case-data.is-read-only-on-idle</code></li><li>• <code>interaction.disposition.is-mandatory</code></li><li>• <code>interaction.disposition.value-business-attribute</code></li></ul>
Interaction Preview (Toast)	<ul style="list-style-type: none"><li>• <code>toast.case-data.format-business-attribute</code></li></ul>
Intercommunication	<ul style="list-style-type: none"><li>• <code>intercommunication.voice.make-call-caller-id-business-attribute</code></li><li>• <code>intercommunication.voice.routing-based-actions</code></li><li>• <code>intercommunication.voice.routing-based-targets</code></li><li>• <code>intercommunication.voice.routing-points</code></li></ul>
KPI	<ul style="list-style-type: none"><li>• <code>kpi.displayed-kpis</code></li></ul>
Login	<ul style="list-style-type: none"><li>• <code>login.prompt-place</code></li><li>• <code>login.voice.prompt-dn-less-phone-number.enable-dynamic-dn</code></li><li>• <code>login.voice.list-available-queues</code></li><li>• <code>login.voice.prompt-queue</code></li></ul>

Outbound	<ul style="list-style-type: none"> <li>• <code>privilege.outbound.can-use</code></li> <li>• <code>privilege.outbound.push-preview.can-use</code></li> </ul>
Screen Recording	<ul style="list-style-type: none"> <li>• <code>privilege.screen-recording.can-use</code></li> </ul>
Team Communicator	<ul style="list-style-type: none"> <li>• <code>presence.evaluate-presence</code></li> <li>• <code>privilege.teamcommunicator.can-manage-favorites</code></li> <li>• <code>privilege.teamcommunicator.can-view-recent-calls</code></li> <li>• <code>teamcommunicator.add-recent-filters.voice</code></li> <li>• <code>teamcommunicator.corporate-favorites</code></li> <li>• <code>teamcommunicator.list-filter-showing</code></li> <li>• <code>teamcommunicator.recent-max-records</code></li> </ul>
Voice	<ul style="list-style-type: none"> <li>• <code>privilege.voice.can-one-step-conference</code></li> <li>• <code>privilege.voice.can-one-step-transfer</code></li> <li>• <code>privilege.voice.can-reject-call</code></li> <li>• <code>privilege.voice.can-release-call</code></li> <li>• <code>privilege.voice.can-two-step-conference</code></li> <li>• <code>privilege.voice.can-two-step-transfer</code></li> <li>• <code>privilege.voice.can-use</code></li> <li>• <code>voice.mark-done-on-release</code></li> <li>• <code>privilege.voice.can-show-hold-duration</code></li> </ul>
Voicemail	<ul style="list-style-type: none"> <li>• <code>privilege.voicemail.can-use</code></li> <li>• <code>voicemail.access-number</code></li> </ul>