GENESYS™

Web Services and Applications Deployment Guide

Installing and configuring the adapter in Salesforce

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Contents

Complete the procedures on this page to install and configure the Gplus Adapter in your Salesforce environment.

If you want to enable Gplus Adapter in Salesforce Lightning after you install and configure the adapter in Salesforce, go here.

The adapter installation procedure involves the following steps:

1. Creating a Gplus Adapter URL.
2. Configuring Gplus Adapter for Salesforce.
3. Adding users to Call Center.
4. Configuring the Utility bar.
5. Configuring the whitelist domain for your Salesforce Console.
6. Configuring screen pops in Salesforce.
7. Accessing Gplus Adapter for Salesforce.
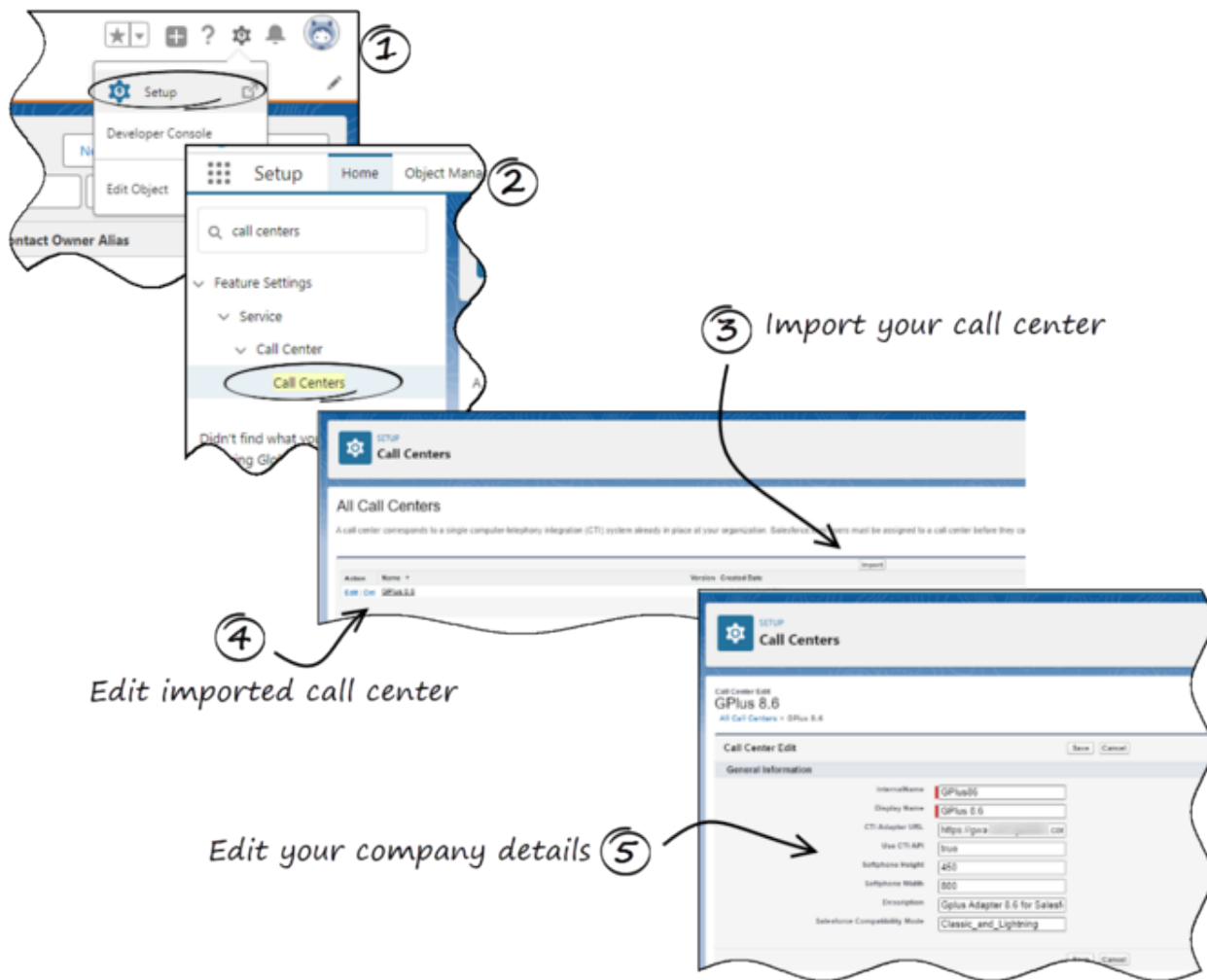
Creating a Gplus Adapter URL

From the Agent Workspace URL, copy the domain name and substitute it in the following URL:

```
https://<domain-name>/ui/crm-workspace/index.html?crm=salesforce
```

Configuring Gplus Adapter for Salesforce

Follow these steps:

1. Click the gear icon in the top right corner and then click **Setup**.

2. Using the **Quick Find** field, search for and access the **Call Centers setup** page.

3. From the **Call Center** settings page, using the **Import** functionality, import the crm-workspace-callcenter.xml file from your computer. If you have not already downloaded the file, download it from here.

4. From the **All Call Centers** list, click the **Call Center** you just imported. For example, Gplus86.

5. From the **Call Center Edit** page, in the **CTI Adapter URL** field, specify the Adapter URL that you constructed in the **Creating a Gplus Adapter URL** section. For example, https://www.genesysgplustest.com/ui/crm-workspace/index.html?crm=salesforce

6. Set **Salesforce Compatibility mode** to **Classic_and_Lightning**.

7. Save the changes.

Adding users to Call Center

The next step after you setup your Adapter is to add users to your call center. You must add at least one user to your call center.

1. In the **Call Centers setup** page, click **Manage Call Center Users**.
2. Click **Add More Users**.

3. On the **Search for New Users** page, you can enter search criteria to find users. Select the ones you want to add to the Gplus Adapter for Salesforce.
4. Click **Add to Call Center**.

5. Your selected users are added to the list. You can remove a user on this page at any time.

Configuring the Utility bar

1. In the setup page, using the **Quick Find** field, search for and access the **App Manager settings** page.

2. Create a new application by clicking **New Lightning App**. Follow the steps in the Lightning App creation procedure in Salesforce documentation.

3. When creating a new Lightning app, follow the additional steps below to configure the utility items for your Gplus Adapter for Salesforce.

   - In the **App Options** step, ensure that you select **Console Navigation**. Gplus Adapter for Salesforce does not support Standard Navigation.

   - In the **Utility Items** step, add **Open CTI Softphone** by clicking **Add Utility Item**.

   - For the soft phone, you can modify the display properties such as **Label**, **Panel Width**, and **Panel Height**.

   - Select **Start automatically** to start loading the data when the Gplus Adapter first opens to ensure that it initializes immediately; otherwise, Gplus Adapter does not load until an agent first opens it from the **Utility Bar**. If Gplus Adapter for Salesforce is not initialized immediately, then agents do not receive voice calls until they first open the application.
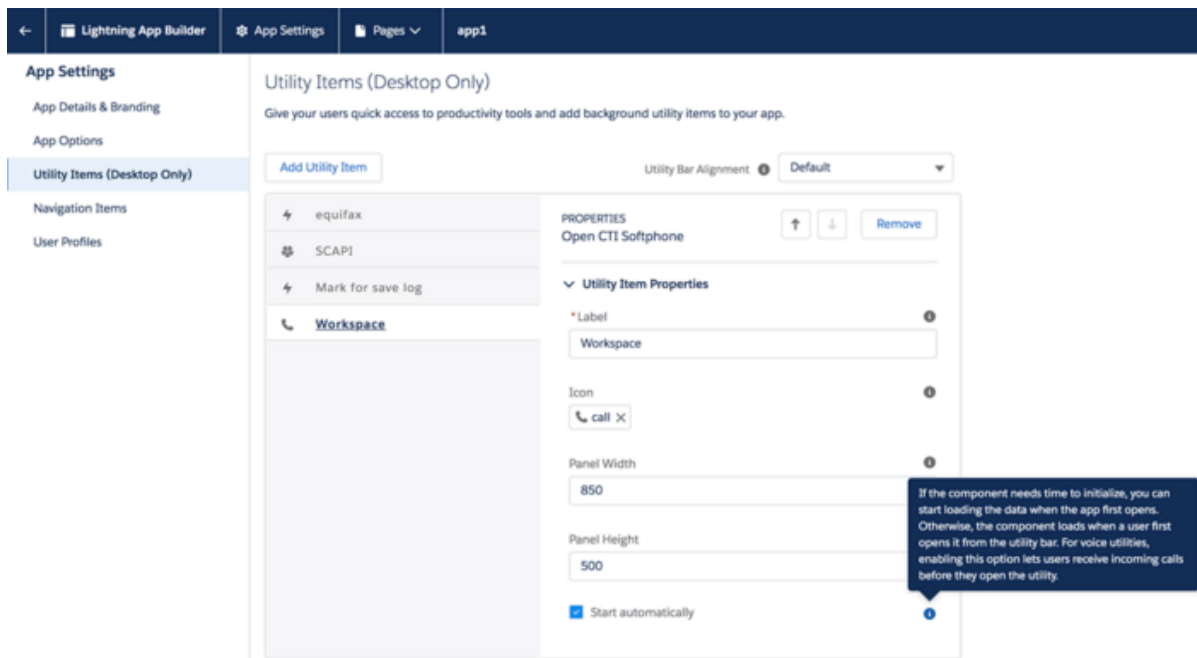
4. Specify **Navigation Items** and **User Profiles** for the new Lightning app by referring to Salesforce documentation.

5. Save the application.

Configuring the whitelist domain for your Salesforce Console

Complete this procedure to add the Genesys domain to the whitelist domains for your Salesforce Console. You need to complete this procedure to allow your users to access the adapter in Salesforce Console in a separate browser window.

Start

1. If you haven't already, login to Salesforce and go to **App Setup > Create > Apps** and select your console app — "Sample Console" in the image below:

2. Click **Edit**. In **Whitelist Domains**, add the host and port for your installation of Web Services. For example: 198.51.100.23:8090

3. Click **Save**.

End

Configuring screen pops in Salesforce

When an agent receives an external call, the adapter can initiate a screen pop that causes Salesforce to show an appropriate record for the caller. To set up this functionality in Salesforce, login and go to **Setup > Customize > Call Center > SoftPhone Layouts** to create a SoftPhone Layout. Check out the Salesforce documentation for details about configuration.

In general, there are a couple of things to consider when you set up a SoftPhone Layout for the adapter:

- The Gplus Adapter for Salesforce ignores the SoftPhone Layout settings that control call-related fields. Instead, the adapter gets this information from toast and case data you configure in the Genesys environment.

- Make sure you configure the **Screen Pop Settings** in the "CTI 2.0 or Higher Settings" section. These settings control whether the screen pop opens in a new window, tab, or Visualforce page.

See Screen pop for more information about configuring screen pops in your Genesys environment.

Accessing Gplus Adapter for Salesforce

You can access Gplus Adapter for Salesforce in Console or Lightning mode by clicking the phone icon in the bottom-left corner.