GENESYS™

Gplus Adapter User Guide

Web Services and Applications 8.6.0

3/24/2024

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Gplus Adapter for Salesforce User's Guide

Welcome to the *Gplus Adapter for Salesforce User's Guide*.

> ### Important
> Beginning with version GWS 8.6 and later, the Gplus Adapter for Salesforce is based on Workspace Web Edition (WWE) only. It's included as part of the Web Services and Applications installation package.

Gplus Adapter for Salesforce is a soft phone integrated within the Salesforce environment that offers many of the same features as the Genesys Agent Desktop. This integration enables users to access integrated Salesforce features such as Click-to-Dial, Screen-Pops, and Activity History without navigating away from Salesforce.

> ### Tip
> For best performance, Salesforce recommends that console users adopt the Google Chrome™ browser and machines with 8 GB of RAM. To view more Salesforce recommendations, see Saleforce Classic Console Recommendations.

Click any of the topics below for details.

- Getting started with Gplus Adapter
- Working with Gplus Adapter
- Click-to-Dial
- Screen Pops
- Activity History
- Activity History (Lightning Experience)
- Open Media Interactions (Lightning Experience)

Getting Started

This article describes about logging in and getting ready to take call from Gplus Adapter embedded into Salesforce.

How do I log in?

If the Agent Desktop console is configured in your sales or service console, you will see a **phone** (configurable) icon at the bottom left corner of your screen. Depending on how your administrator has configured, the **phone** icon might appear elsewhere on the screen.

If your sale or service console is configured for single sign-on, you don't need to log in into Agent Desktop. You should have immediate access. If your console isn't configured for single sign-on, you are prompted to log in.

You can log into Gplus Adapter from within Salesforce by doing the following:

1. Click the **phone** icon in the Salesforce Utility Bar. Note that the name of the icon (for example, Workspace) and its position within the Salesforce Utility Bar are configurable.

2. Follow the log in procedure. For more information about logging in, see Getting started in the Genesys Agent Desktop help.
3. After you successfully log in, you can start working in the Adapter main view.

> ## Warning
> Logging in to Salesforce does not automatically log you in to Gplus Adapter. If the Adapter icon does not show your current Genesys Agent Desktop status, you are not logged in to Genesys and you cannot make or receive calls and other interactions.

Gplus Adapter main view
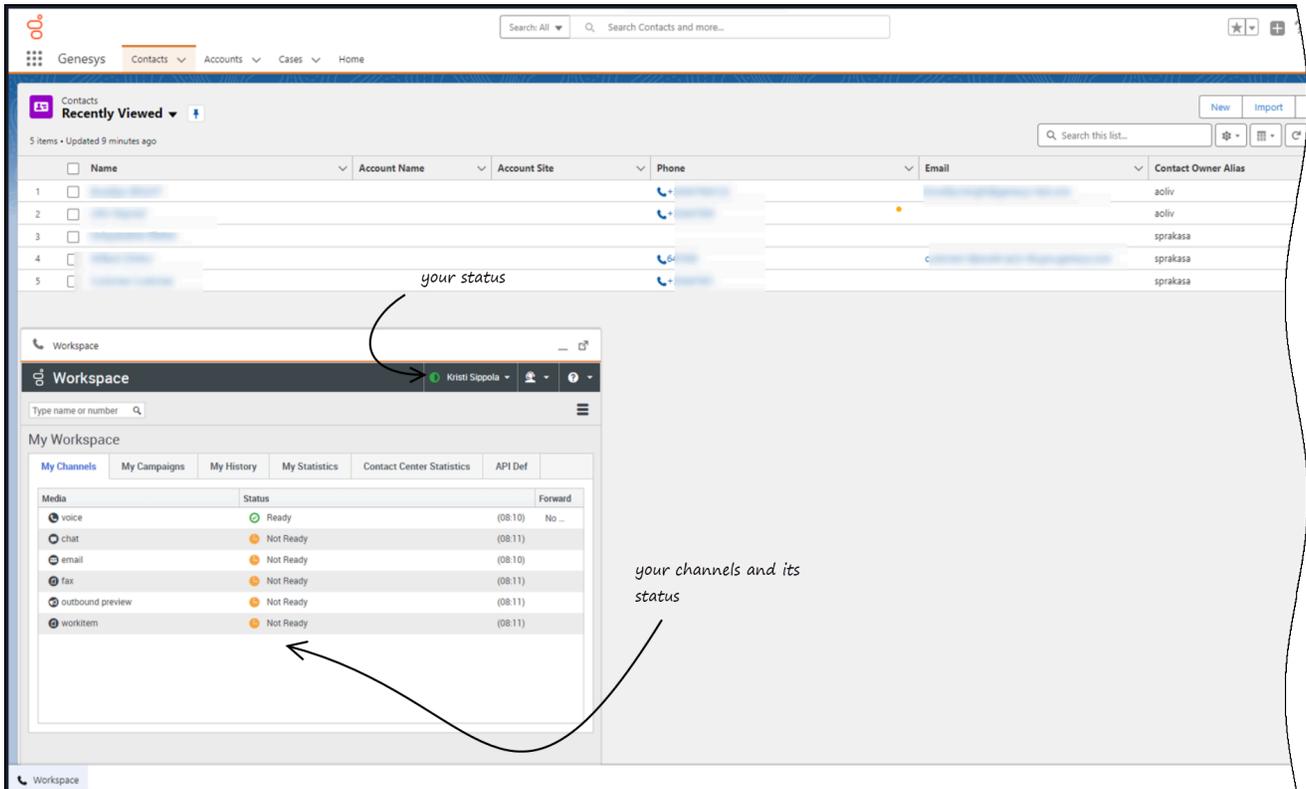
The Gplus Adapter button in the Salesforce Utility Bar displays your current status obtained from Agent Desktop. If Gplus Adapter is minimized, it still reflects changes to your current status. Refer to Getting started in the Agent Desktop Help for more information about your status and the status icons.

How do I log out?
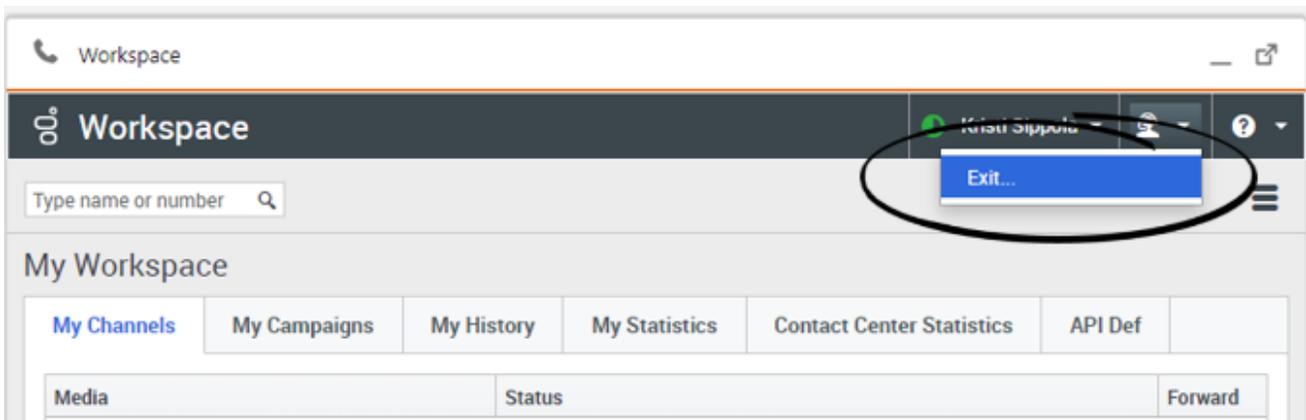
> ### Important
> Genesys recommends that you log out of Gplus Adapter before you log out of
> Salesforce or close the last Salesforce tab.

To log off all channels and sign out of Gplus Adapter, click the agent icon and then select **Exit**. A
modal pop-up window will open asking your confirmation to log out of the application. Click **Exit**. If
your company does not use SSO, Adapter returns you to the login page, where you can enter your
credentials again, if needed.

Ensure that you close all the interactions before logging out, otherwise you will see an error message.

Agent monitoring for team leads

Some workers at contact centers are designated to be Team Leads or Supervisors. In this role, it is
your responsibility to ensure that the agents that you supervise are successful.

If you are a supervisor, your account might be set up to enable you to monitor, coach, and/or barge-
in to voice and/or chat interactions that are being handled by the agents that you supervise. You can
monitor their performance on voice calls and chat interactions, coach them on voice calls and chat
interactions as part of their training or to help with a difficult-to-handle contact, or join (barge-in to) a
voice call or chat interaction to help the contact directly.

For more information, see Agent Monitoring Information for Team Leads.

> **Important**
>
> - If you use the Mozilla Firefox web browser, issues might occur if you pop the Agent Desktop console out to a new browser window or if you move the Agent Desktop console within the Salesforce sales or service console.
>
> - In Lightning Experience mode, you cannot move, pop out, or resize the Agent Desktop window. The size of the window is pre-configured during deployment.

Related Documentation

- For agents—To learn how to use Agent Desktop, see Genesys Agent Desktop help.

Working with Gplus Adapter for Salesforce

Gplus Adapter for Salesforce enables you to handle your contact center functions from Salesforce. It integrates Salesforce features such as activity history update, screen pop, and click-to-dial.

How do I access Gplus Adapter?

When Gplus Adapter is integrated in Salesforce, a phone icon is displayed in the lower left or lower right corner of the Salesforce window depending on how your organization had set it up for its users. To open a pop-up login dialog box, click the **phone** icon, then log in with your Adapter credentials.

Integrating Interactions with Salesforce Lightning

Gplus Adapter integrates functionality of the following interaction types with Salesforce:

- Voice
- Chat
- SMS
- Email
- Outbound Preview
- Open Media Work items

For more information about handling specific interaction types, refer to the Genesys Agent Desktop help.

Pop out, move and resize Adapter
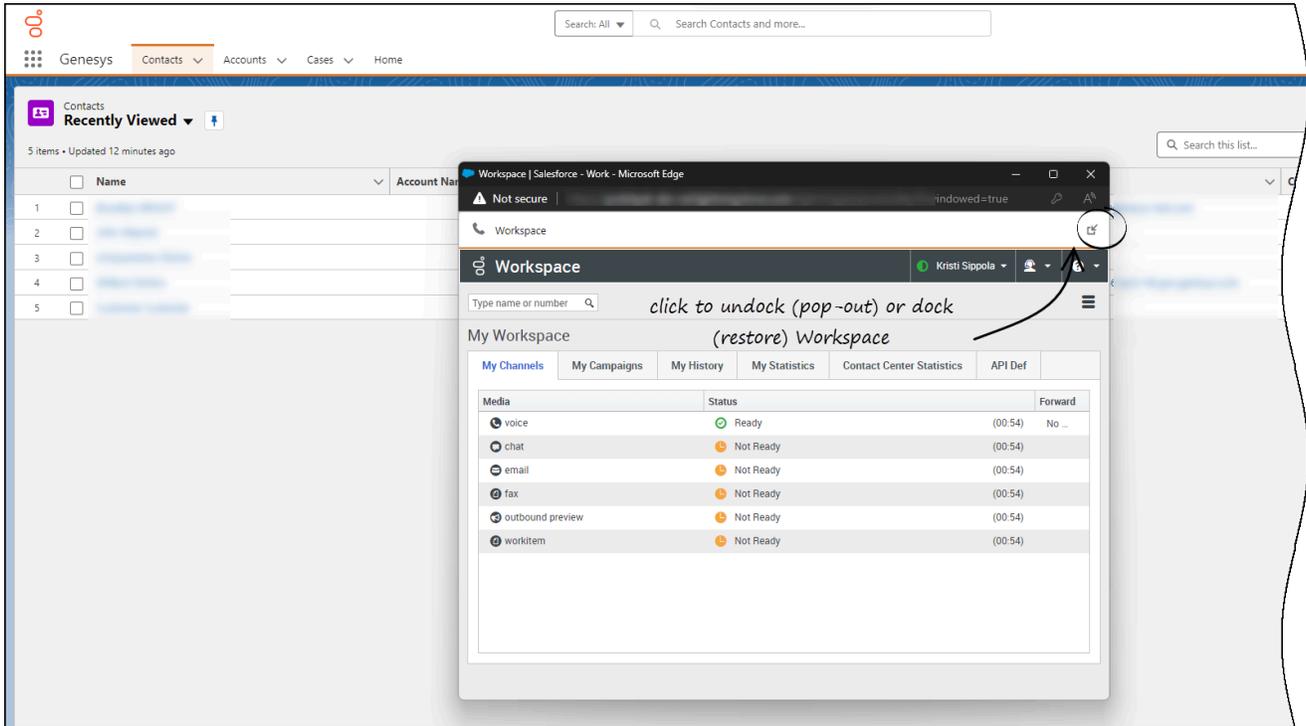
By default, the Adapter window opens in the lower left corner in the Salesforce environment.

To move the Adapter window to a different location, undock (pop out) the window by clicking in the upper right corner, then drag the Adapter window to a new location. Once you undock the window, you can move or resize the window as needed.

You can dock (restore) the window back to its original position by clicking .

Manually maximize or minimize the Adapter window by clicking .

Interaction events triggering Adapter to be maximized

If you have minimized Adapter to handle other tasks in Salesforce, the following events automatically maximize the Adapter window:

- Receiving voice, chat, SMS, email, or workitem interactions
- Releasing interactions
- Marking Done interactions
- Receiving connections error notifications

- Receiving confirmation that an interaction has been processed

Supported features

Gplus Adapter includes features that integrate with a Salesforce environment. Actions you take in Salesforce or Gplus Adapter are passed seamlessly between them.

The integrated features are:

- Click-to-dial
- Screen pops
- Activity history

Using Gplus Adapter in multiple browser tabs

By default, you can work with Gplus Adapter in multiple Salesforce browser tabs. Gplus Adapter is available in each new Salesforce browser tab you open.

The following section describes how the main Gplus Adapter functions are supported in multiple browser tabs:

- Click-to-dial: If an agent clicks-to-dial in one Salesforce browser tab, an outbound call is initiated in Adapter in all browser tabs. The agent can continue to handle the interaction in any open browser tab.
- Screen pop: The screen pop is displayed in all browser tabs that are running Gplus Adapter. Screen pop FLOW, screen pop NEW_RECORD_MODAL, and creation and screen pop of new Salesforce record are triggered only in the active tab.
- Activity history: The activity history on interaction Mark Done or Salesforce screen pop is created once for each interaction irrespective of how many browser tabs are running Gplus Adapter.

Genesys recommends logging in to Adapter in the first browser tab before opening Gplus Adapter in multiple tabs. Before using Adapter in any open browser tab or opening Adapter in a new tab, make sure that Adapter has finished operations in your active page and is fully loaded.

Refer to the Genesys Agent Desktop help for more information about using Agent Desktop in multiple browser tabs.

Gplus Adapter might be restricted to only one browser tab

In some organizations, Gplus Adapter may be used only in the first Salesforce tab you use to login to Gplus Adapter; it is prevented by your organization's administrator from loading in a second browser tab. If Gplus Adapter is set up to prevent loading in a second browser tab, you will see the following message when you open a subsequent tab running Salesforce with Gplus Adapter: **Gplus Adapter is configured to be loaded in only one browser tab.**

Related Documentation

- To learn how to use Gplus Adapter, see the Genesys Agent Desktop help.

Click-to-Dial

Click-to-dial makes connecting to your customers easy. All you have to do is click their phone number to make a call.

Using Click-To-Dial

The click-to-dial feature enables you to have Adapter automatically dial a call when you click a phone number in Salesforce. For example, you can search for a contact in Salesforce and then click the related phone number in the search result to dial the call.

This capability might be disabled in your account configuration by your administrator.

Related documentation

- To learn how to use Gplus Adapter, see the Genesys Agent Desktop help.

Screen Pops

Screen pops are Salesforce records or other objects that are displayed when an agent receives a call, chat, SMS, email, or other media channel interaction in Adapter.

How to use Screen Pops?
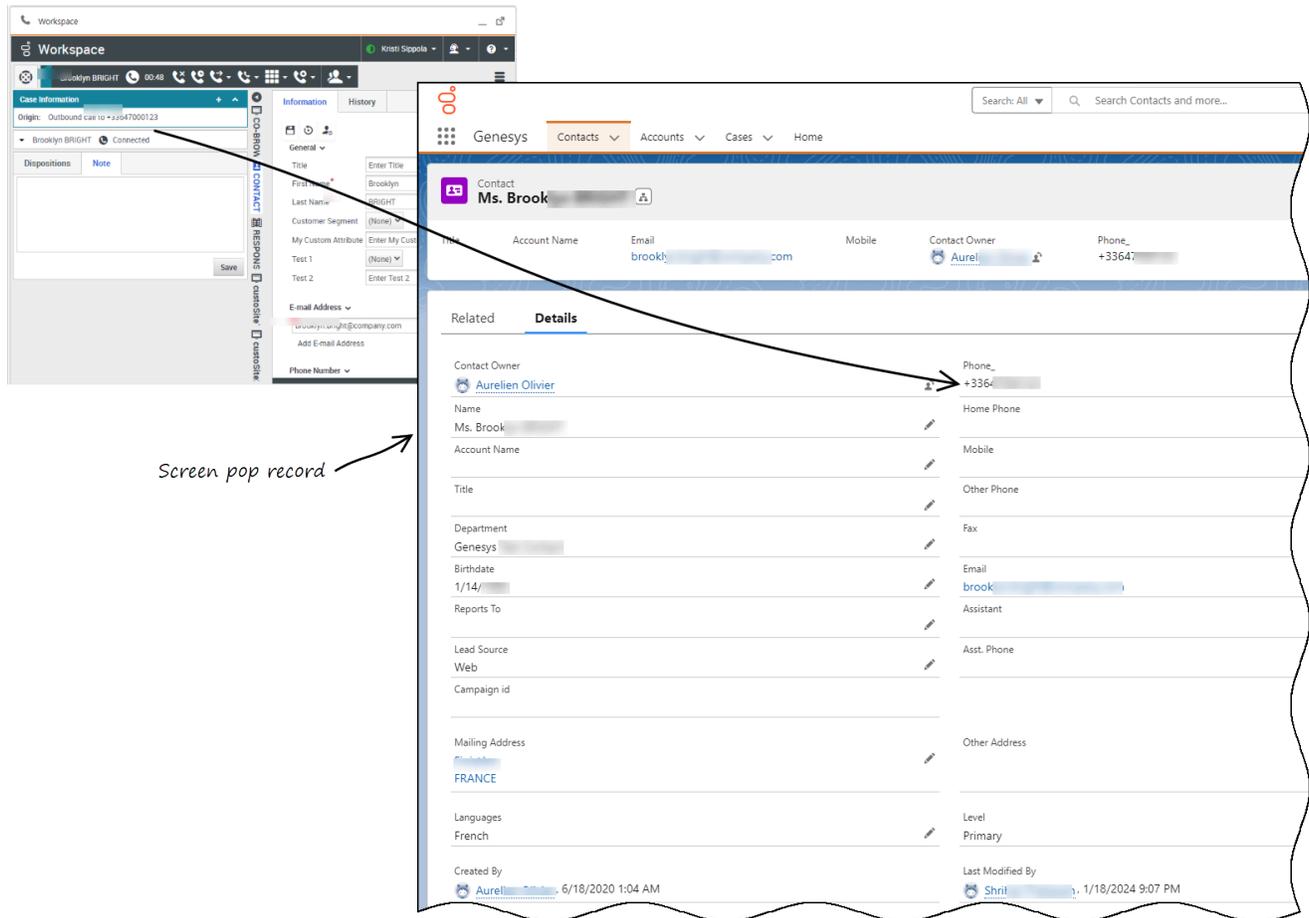
Screen pop record

During screen pop, Salesforce might display one or more related records, depending on what information it has about the contact. For example, if a contact enters their case number before they talk to an agent, Salesforce displays the case automatically when you receive or make a call in Adapter. If no contact information is available, the **New Contact** dialog box or another record page is displayed (depending on how your administrator set up your account).

If there are multiple records that match the screen pop, the **Multiple Search** view is displayed. To associate the task to that object, select the Salesforce object.

In some configurations, such as when a new Salesforce record is created by Gplus Adapter automatically, the new record is displayed as a screen pop in Salesforce.

Events that trigger a Salesforce record screen pop

A Salesforce record screen pop typically triggers:

- When an interaction is initiated (ringing call)

- After you have accepted an interaction (establishing a call).

Your administrator sets up Gplus Adapter to trigger screen pops based on different events. The following events might trigger Salesforce record screen pops for different interaction types:

Interaction type	Event
Voice interaction	Call ringing
	Call accepted and established (if it was previously ringing)
Chat or SMS interaction.	Chat or SMS notification received (**Note**: For SMS, screen pop appears only for an unassigned contact. When receiving an SMS from an assigned contact in the **Communication** tab, no screen pop is displayed)
	Chat or SMS notification accepted
Email interaction	Email notification received
	Email notification accepted
Open media interaction	Open media (workitem) notification received
	Open media (workitem) notification accepted
Outbound interaction	Clicking **Get Record**
Outbound Push-Preview interaction	Outbound record notification accepted

Outbound campaigns

The Outbound Campaign calling list correctly updates only if you dial from Agent Desktop. The calling list is not updated if you dial by using a click-to-dial phone number field in Salesforce because this action is not considered to be an Outbound Campaign call.

Related documentation

- To learn how to handle interactions, see the Genesys Agent Desktop help

Activity History

Gplus Adapter for Salesforce adds details about the interactions you handle in the Salesforce contact activity history.

When you mark a voice, chat, inbound email, or outbound campaign interactions as done (**Mark Done**), the details about the interaction are added to the contacts's activity history in Salesforce.

The types of information that are saved in the activity history include:

- Call duration
- Call type
- Case data
- Call UUID

- Disposition

- Notes

- Time stamp

- Chat transcript

- Email subject

- Email body

> ### Tip
>
> - For chat interactions, the **Call type** field shows all chats as **Inbound**.
>
> - For emails, the **Call type** field shows **Inbound** for received emails and **Outbound** for sent emails and replies.

Voice calls or chats that could not be established are not saved in the history. When a voice call or chat involves multiple parties, such as consultations and conferences, the activity is saved as only one interaction.

Related documentation

- To learn how to use Gplus Adapter, see the Genesys Agent Desktop help.

Gplus Adapter for Salesforce Lightning

Gplus Adapter for Salesforce can be used in Lightning Experience mode in Salesforce. The usage of specific features vary slightly in Lightning Experience mode. The following articles describe those changes in detail.

- Activity History (Lightning Experience)
- Open Media Interactions

Activity History (Lightning Experience)

The Lightning Experience functionality is the same as it is in Salesforce Console with the following exception(s), you should be aware of:

Accessing Activity history in Lightning
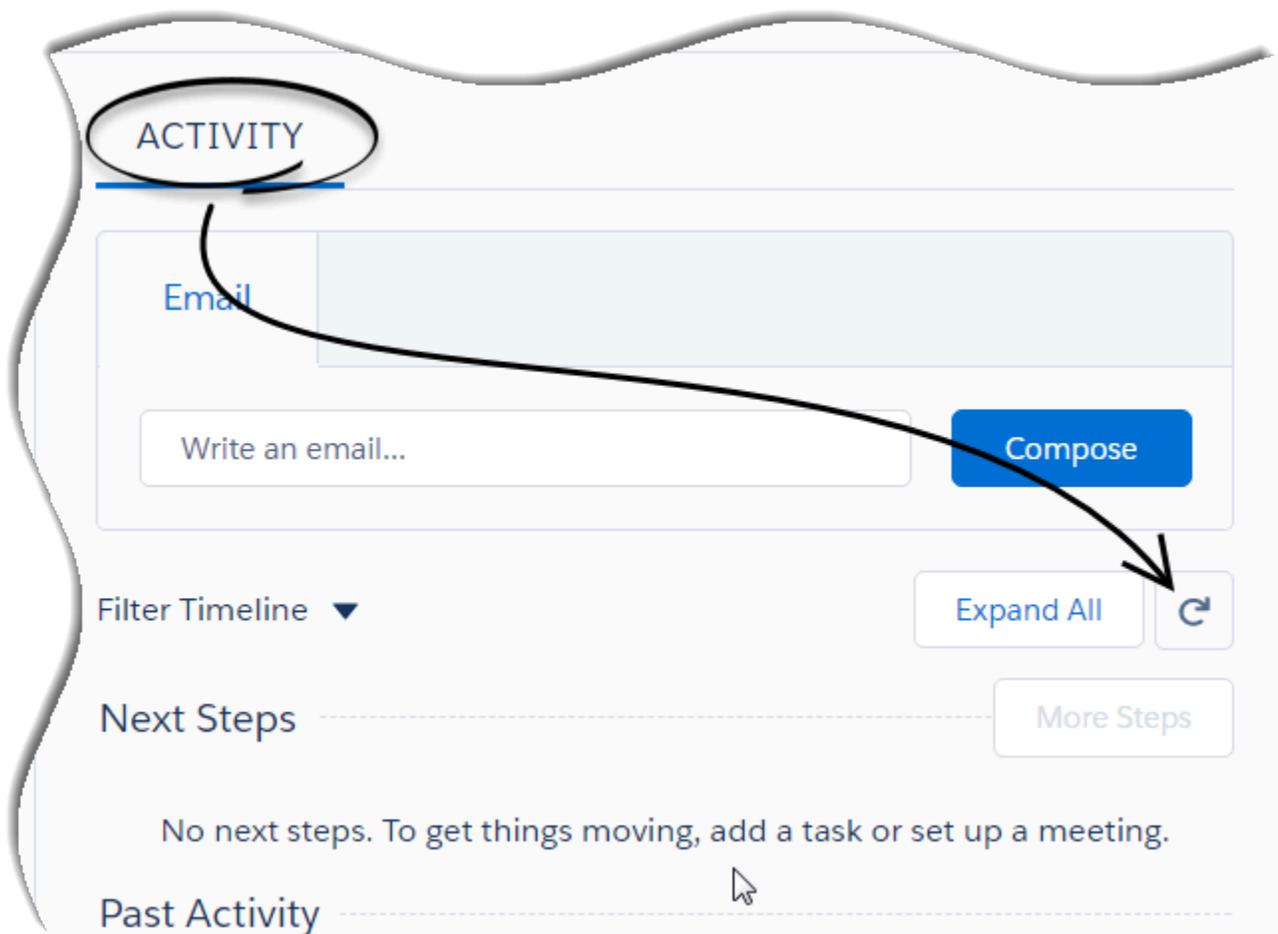
Accessing the activity record can be done slightly differently in Lightning Experience. There is a **Refresh Activity History** icon that can be used instead of navigating off the page, or refreshing:

1. Click **Contacts** from the menu bar.

2. Select the contact name.

3. Click the **Refresh Activity History** icon, in the **Activity** tab to review all **Past Activity**.

4. Clicking on an activity will open the **Task** window for that item.

Open Media Interactions

Open media is an interaction type that you might be required to handle besides the other non-voice interactions such as email or chat. Open media is generally configured as a channel (Workitem) by your organization and it is available under **My Channels** tab. Note that the open media interaction is supported only in Salesforce Lightning Experience.

Like any other interaction, you can set your status to ready, accept and work on the open media interaction, transfer to an agent, set disposition, and mark done. You can view your open media activity details under Activity History.

See Workitems page for full functionalities of this feature.

> ## Important
>
> Workbin for open media is not supported in Lightning Experience mode. You can move an open media interaction in and out of a Workbin, however the functionalities that involve integration with Salesforce such as screen pop and activity history are not supported.

Screen pop for Open Media
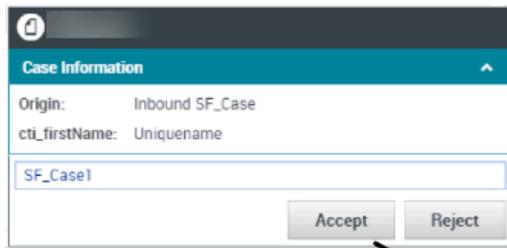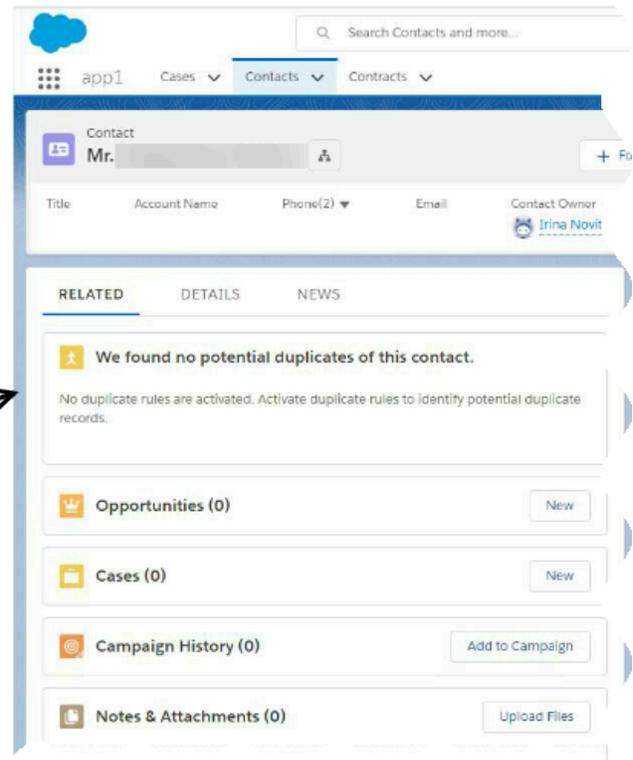
When you accept the open media invitation in Agent Desktop, you can notice that the related contact record is shown as a screen pop in the **Contacts** tab in Salesforce Lightning. If there is no contact information available, the **New Contact** page is displayed.

If configured by your administrator, you may also get a screen pop on open media invite or transfer from other agents.

Activity History for Open Media

When you mark an open media interaction as done (**Mark Done**), the details about the interaction are added to the contacts's activity history in the **Activity** tab in Salesforce Lightning.
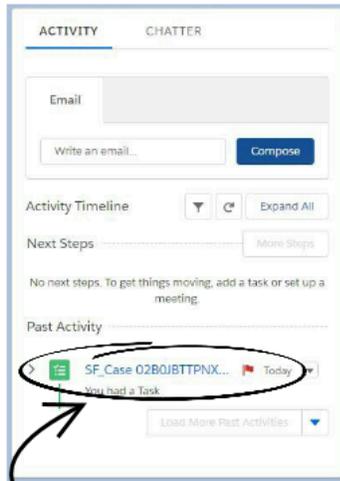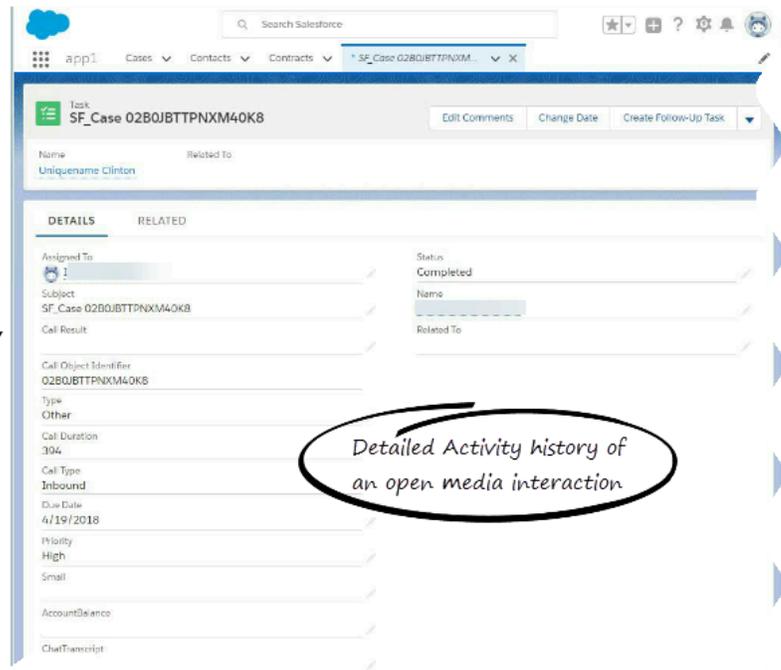
To view the detailed activity history,

- Click on the activity link in the **Past Activity** section. The activity history and its details are displayed as a separate tab in Salesforce Lightning.

The types of information that are saved in the activity history of an open media activity include:

- Assigned To
- Created By
- Last Modified By
- Subject
- Due Date
- Related To
- Comments
- Status
- Priority
- Call Duration
- Call Object Identifier

- Call Type (*inbound* only)

- Call Result