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Web Services and Applications Migration Guide

Migrating Gplus Adapter for Salesforce

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Migrating Gplus Adapter for Salesforce

The Gplus Adapter for Salesforce is an integrated solution that enables Salesforce users to handle contact center interactions seamlessly within Salesforce. The adapter is part of the Genesys Gplus Adapters, which provide out-of-the-box, pre-packaged, and vendor-validated solutions that integrate Genesys' Customer Experience Platform to the leading CRM solutions. The adapter is included in the Web Services and Applications installation package.

There are two deployment options available for the adapter:

- **Gplus Adapter for Salesforce** provides a smaller interface designed for Salesforce Classic, although it also works in Salesforce Console.
- **Gplus Adapter for Salesforce - Workspace Web Edition** provides the full Workspace Web Edition interface and is only available in the Salesforce Console.

If you would like to migrate to Gplus Adapter for Salesforce - Workspace Web Edition, follow this procedure:

Tip

The data in Step 7 can be entered directly into an existing Call Center Configuration. Cloning the Call Center Configuration allows a backup of the configuration and opportunity for testing the new configuration.

1. Log into Salesforce.com with your administrator credentials to open the **Home** page.
2. Go to **Setup**.
3. In the **Quick Find** field, type **Call Center**.
4. Click **Call Centers**.
5. Click **Genesys Gplus for Salesforce**.
6. Click **Clone**.
7. Enter the following values:

Parameter	Value
Internal Name	Limited to 40 chars and the first character must be a letter
Display Name	Limited to 40 chars and the first character must be a letter
CTI Adapter URL	https://host:port/ui/crm-workspace/index.html
Softphone Height	Recommended: 325 Minimum: 300
Softphone Width	Recommended: 850

Parameter	Value
	Minimum: 500

8. Click **Save**.
9. Add your company domain where Web Services and Applications is installed to the whitelist.



- a. Click **App Setup** > **Create** > **Apps**.
- b. From the **Apps** list, click the application specific to your Salesforce deployment.
- c. Click **Edit**.
- d. Scroll down to the **Whitelist Domains** section, and then type your company domain. For example:
live.genesys.com:8043
If you use the default port (443), you do not need to specify the port.
- e. Click **Save**.

Next steps

After you migrate your Gplus adapter, you must provision the call center with users. If you have a previous Salesforce Call Center, remove users from that Call Center and add the users to the new call center you just added.

Removing Multiple Users

To remove multiple users from a call center:

1. Log into **Salesforce** with your administrator credentials to open the **Home** page.
2. Click **Setup**, found under the **User menu** drop-down list, under your user name in the top right corner, to open the **Force.com** page.
3. From the **App Setup** section on the left side of the screen, click **Customize** to open the customization options.

4. Click **Call Center** to open the **Call Center** page.
5. Click **Manage Call Centers** under the **Call Center** section.
6. Click the name of the call center from which you want to remove the Salesforce user.
7. In the **Call Center Users** section, click **Manage Call Center Users**.
8. Select the **Action** check box next to each user you want to remove.
9. Click **Remove Users**.

Adding Users

You can add new users to your Salesforce call center using the following steps:

1. Log into **Salesforce** with your administrator credentials to open the **Home** page.
2. Click **Setup**, found under the **User menu** drop-down list, under your user name in the top right corner to open the **Force.com** page.
3. From the **App Setup** section on the left-hand side of the screen, click **Customize** to open the customization options.
4. Click **Call Center > Call Centers**.
5. Click the name of your contact center.
6. In the **Call Center Users** section, click **Manage Call Center Users**. You can also access this button from the **Call Center Edit** screen, if you are editing your `callcenter.xml` file.
7. Click **Add More Users**.
8. Specify the search criteria to find the users who you want to assign to your call center. For example, you can search by the **Last name** field.
9. Click **Find** to display the refined list of your search criteria.
10. Select the check boxes for the users that you want to add.
11. Click **Add to Call Center**.