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Web Services and Applications Deployment Guide

Installing and configuring the adapter in Salesforce

5/10/2025

Installing and configuring the adapter in Salesforce

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

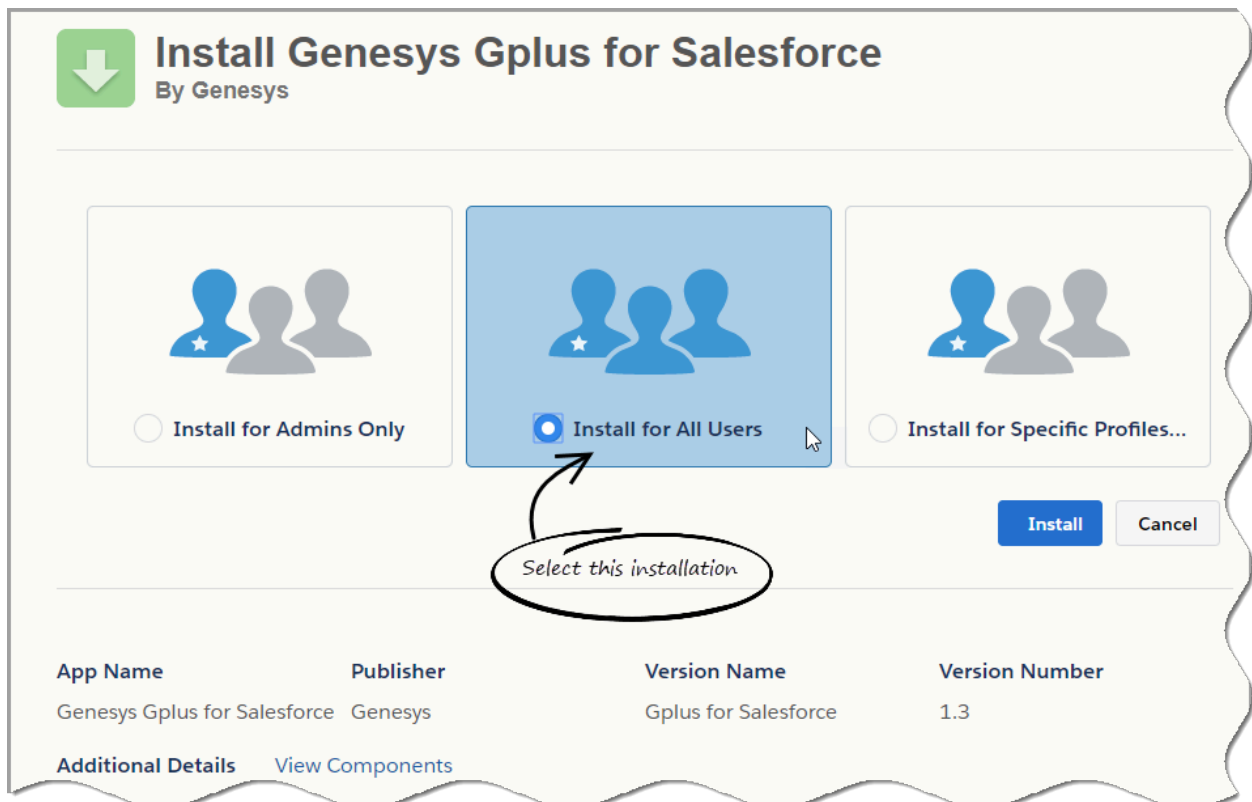
Installing the adapter in Salesforce

Prerequisites

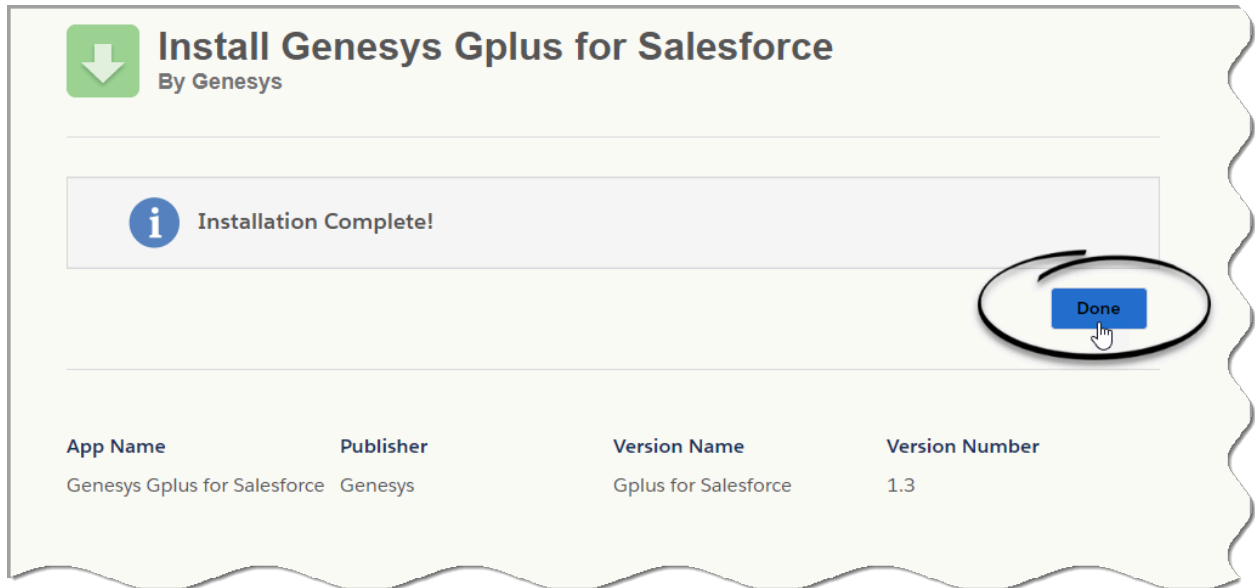
- You have installed and configured Web Services.
- You have set up SSL for Jetty. For more information, see [Configure SSL](#).

Start

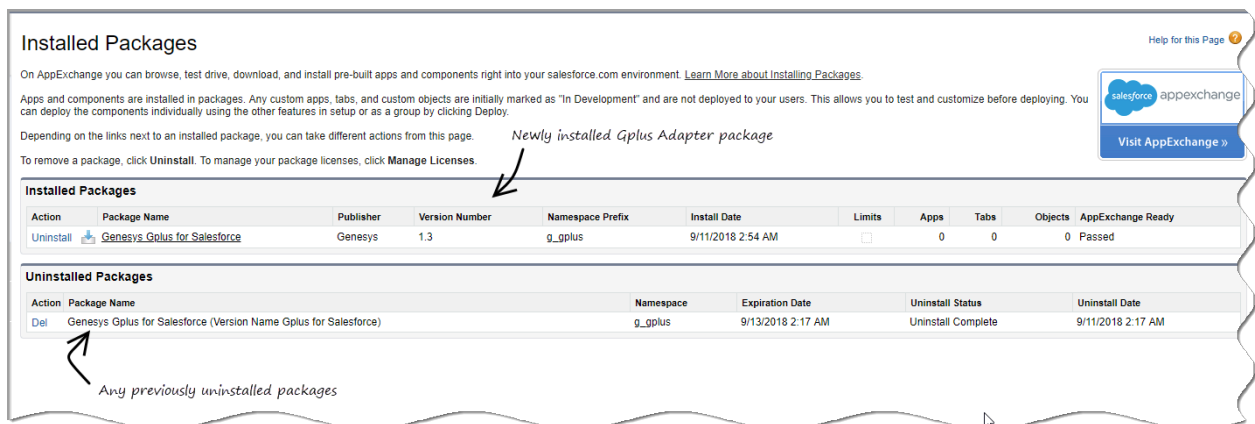
1. Open the following URL to install the latest Gplus Adapter for Salesforce package in Salesforce:
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04to00000000C3VD>
If you're not logged in, Salesforce prompts for your username and password.
2. Now you should see the **Install Genesys Gplus Adapter for Salesforce** page. Select an installation type. Generally, you should select **Grant access to all users**, but if you want to limit access to the adapter to specific profiles, then you can choose **Install for Specific Profiles** Click **Install**.



- When you see the "Installation Complete!" message, click **Done**.



You should be redirected to the **Installed Packages** page, with "Genesys Gplus for Salesforce" included in the list.



End

Configuring the adapter in Salesforce

Complete this procedure to define your call center in Salesforce. The call center was created when you installed the Gplus Adapter for Salesforce package.

Start

1. If you haven't already, login to Salesforce and go to **Setup > Build > Customize > Call Center > Call Centers**. Or, you can search for "Call Centers" in the **Search All Setup** field and select the "Call Centers" result. You should see the **Introducing Salesforce CRM Call Center** page. **Note:** You must have administrator privileges.
2. You can select **Don't show me this page again** if you want to hide the page in the future, and click **Continue**.
3. On the **All Call Centers** page, click **Edit** next to the Genesys Gplus for Salesforce entry.
4. In the **CTI Adapter URL** field, replace GWS_HOST:GWS_PORT with the correct host and port for your installation of **Web Services**. For example: `https://198.51.100.23:8090/ui/crm-adapter/index.html?crm=salesforce`

If you're enabling single sign-on in the adapter, add the `authType=saml` parameter to the **CTI Adapter URL**. For example: `https://198.51.100.23:8090/ui/crm-adapter/index.html?crm=salesforce&authType=saml`

You should leave the other options at their default values so the adapter works correctly in Salesforce.

Call Center Edit Help for this Page ?

Genesys Gplus for Salesforce

[All Call Centers](#) » Genesys Gplus for Salesforce

Call Center Edit Save Cancel

General Information ! = Required Information

InternalName	GenesysGplusForSalesforce
Display Name	Genesys Gplus for Salesforc
CTI Adapter URL	https://198.51.100.23:8090/ui
Use CTI API	true
Softphone Height	400
Softphone Width	200

Save Cancel

5. Click **Save**.
6. Click **Manage Call Center Users** and then click **Add users**.

Call Center

[Help for this Page](#) ?

Genesys Gplus for Salesforce: Manage Users

[All Call Centers](#) » [Genesys Gplus for Salesforce](#) » Manage Users

View: All ▼ [Create New View](#)

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) **All**

		Add More Users	Remove Users	
Full Name ↑	Alias	Username	Role	Profile
No records to display.				

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) **All**

7. On the **Search for New Users** page, you can enter search criteria to find users. Select the ones you want to be able to use the adapter and click **Add to Call Center**.

Call Center

[Help for this Page](#) ?

Genesys Gplus for Salesforce: Search for New Users

[All Call Centers](#) » [Genesys Gplus for Salesforce](#) » [Manage Users](#) » [Search for New Users](#)

Set the search criteria below and then click Search to find salesforce.com users who should be enabled as call center agents. Users already enabled as call center agents are excluded from the search results.

First Name	▼	equals	▼	Helen	AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND

Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 23/03/2015
- For date/time fields, enter the value in following format: 23/03/2015 10:42 PM

<input type="button" value="Add to Call Center"/> <input type="button" value="Cancel"/>					
<input type="checkbox"/>	Full Name	Alias	Username	Role	Profile
<input type="checkbox"/>	Jackson, Helen	hjackson	hjackson@genesysmail.com		Standard User

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

Call Center Help for this Page ?

Genesys Gplus for Salesforce: Manage Users

[All Call Centers](#) » [Genesys Gplus for Salesforce](#) » Manage Users

View: All ▼ [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

[Add More Users](#) [Remove Users](#)

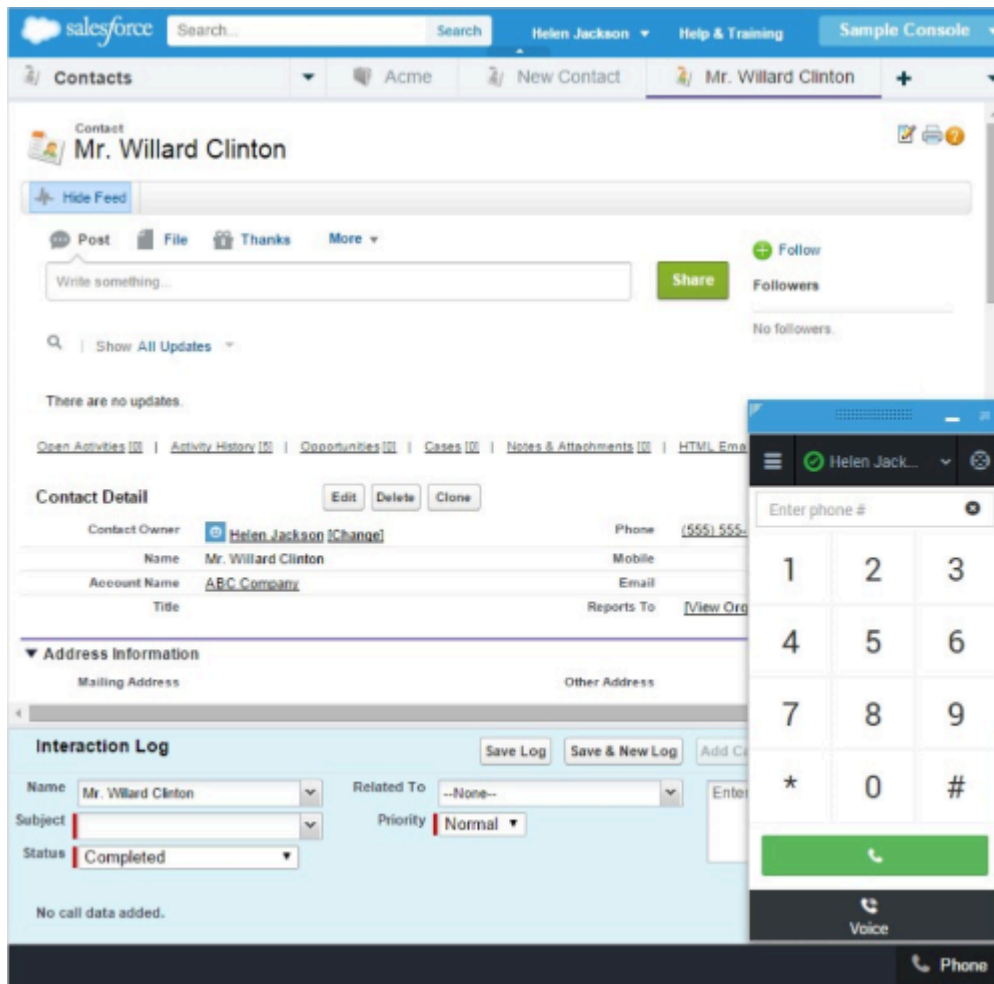
<input type="checkbox"/>	Action	Full Name ↑	Alias	Username	Role	Profile
<input type="checkbox"/>	Remove	Jackson, Helen	hjack	hjackson@genesysmail.com		Standard User

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

8. To access the adapter in Salesforce Classic, look for it in the left pane of your browser; in Salesforce Console, click the **Phone** button in the bottom right corner.

The screenshot shows the Salesforce Classic interface for a user named Helen Jackson. The left sidebar contains a 'Phone' button and a 'Voice' button. The main content area displays a dashboard with two charts: 'How much coaching is my team getting?' and 'Which goals are behind or critical?'. Both charts show 'The report returned no results.' The 'My Tasks' section shows 'You have no open tasks scheduled for this period.' The 'Calendar' section shows 'Scheduled Meetings' and 'Requested Meetings'.

The adapter in Salesforce Classic.



The adapter in Salesforce Console.

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.