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Gplus Adapter User Guide

Web Services and Applications 8.5.2

11/29/2023

Table of Contents

Gplus Adapter User's Guide

Welcome to the *Gplus Adapter User's Guide*. The Gplus Adapter has two implementations:

- **Gplus Adapter for Salesforce** is a soft phone that can be embedded in your Salesforce sales or service console or accessed in a separate window that is launched from a **Phone** icon. The standard adapter has a fixed size and the features and functionality are designed for a small screen space.

- **Gplus Adapter for Salesforce - Workspace Web Edition (WWE)** is an enhanced soft phone that has a larger window size and provides many of the same features and functionality as the Genesys Workspace Agent Desktop.

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.

Gplus Adapter for Salesforce

- Getting Started
- Handling Calls
- Working with the chat channel
- Managing case information
- Accessing voicemails
- Managing contacts
- Viewing reports
- Submitting feedback
- Transferring a Call
- Chatting with a Customer

Gplus Adapter for Salesforce - WWE Option

- Gplus Adapter for Saleforce - WWE option
- Lightning Experience in Gplus Adapter for Saleforce - WWE option

Gplus Adapter for Salesforce

> **Important**
>
> This version of Gplus Adapter for Salesforce is no longer supported by Genesys. We recommend you to upgrade to Gplus Adapter for Salesforce - WWE Option. For migration steps, see Migrating to Gplus Adapter for Salesforce - WWE Option.

As an agent, you'll be handling calls and making sure that you keep on top of your Key Performance Indicators (KPIs). Gplus Adapter is your softphone for handling calls (both inbound and outbound) and other interactions, such as chat or email. The softphone is launched from your contact management or ticket management system.

> **Important**
>
> What you see in the Gplus Adapter depends on your contact center and your role within it, so you might not be able to do or see all the things covered in this help. If you think you should be able to do or see something you can't, check with your supervisor or system administrator.

To get up and running quickly with your Gplus Adapter for Salesforce, see Getting Started.

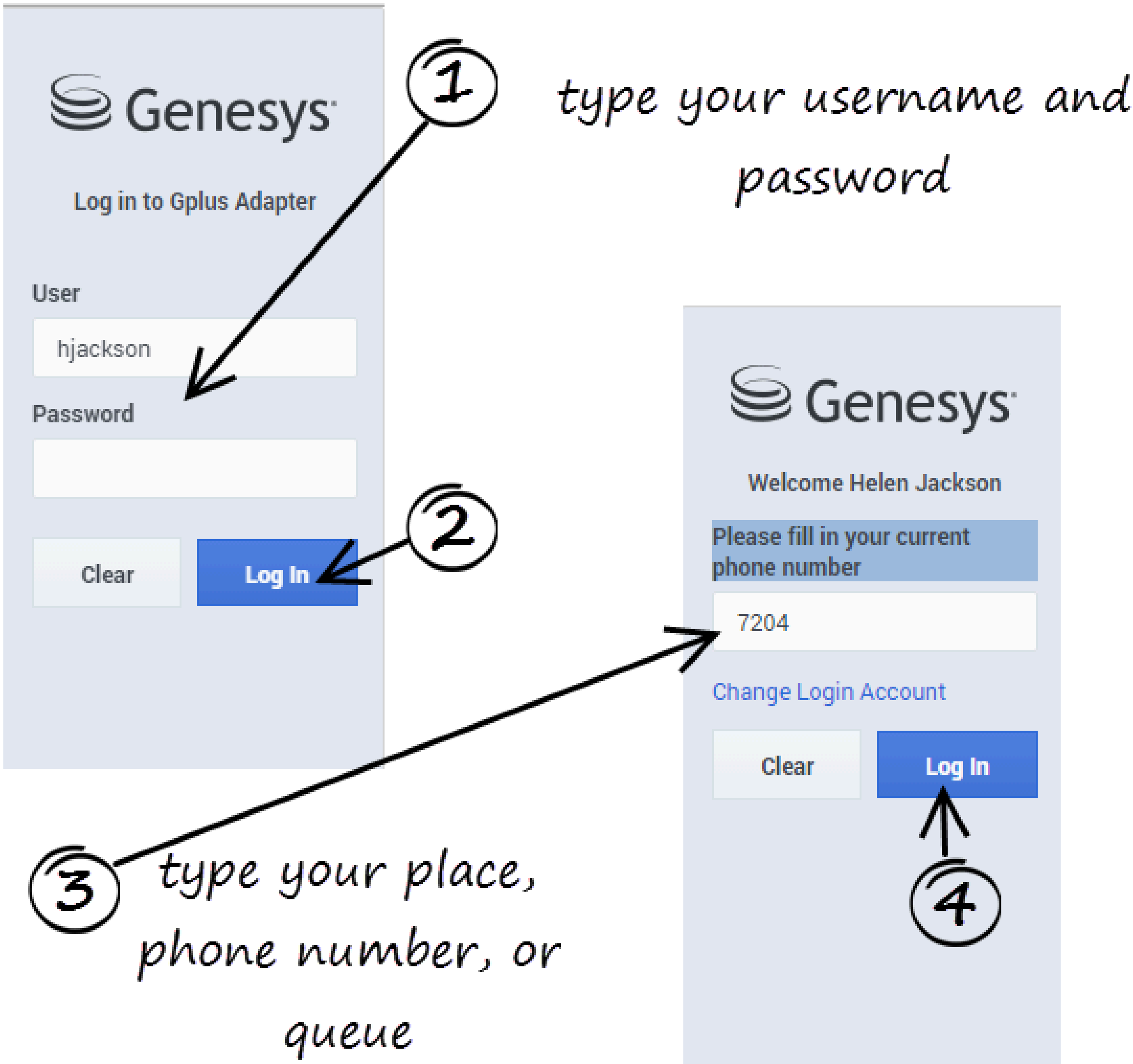
Getting started

Important

This version of Gplus Adapter for Salesforce is no longer supported by Genesys. We recommend you to upgrade to Gplus Adapter for Salesforce - WWE Option. For migration steps, see Migrating to Gplus Adapter for Salesforce - WWE Option.

Now that you know what the Gplus Adapter is, you’re probably wondering how to use it. Let’s get started.

How do I log in?

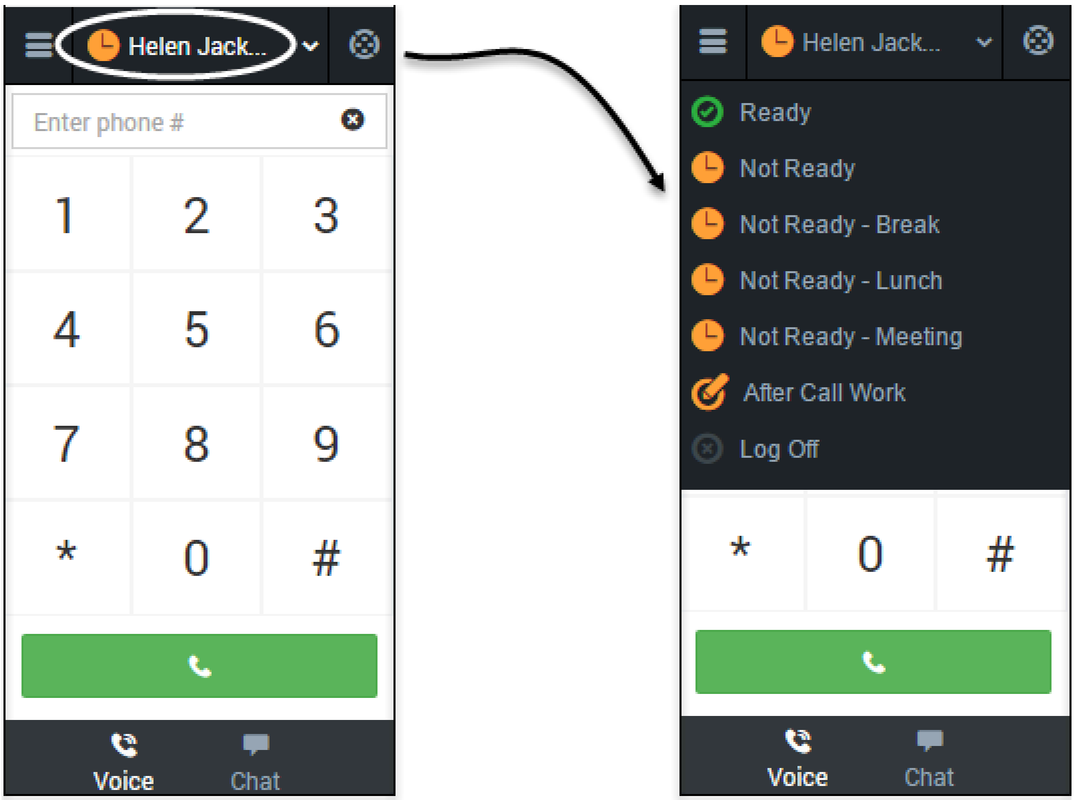


Open a browser (if your system uses a web-based phone, use Chrome) and enter the link for the CRM or ticket application that your supervisor gave you. The Adapter is either in the left pane or you can launch it by clicking **Phone** in the bottom-right corner of the screen—it's one or the other, depending on how your administrators have configured the CRM.

Depending on how your administrator has configured the adapter, you might also see a secondary login window where you're prompted to enter the name of a place, a phone number, or enter a queue.

See Logging In for more details.

How do I set my status to be available for calls?



Typically, your status will be **Not Ready** after you log in. However, your administrator might have configured your status to **Ready** after login, so it is a good idea to check your status.

You can see your status in the Gplus Adapter for Salesforce on the agent status bar at the top of the adapter. You can also hover over the status bar with your mouse to see more details about login time, phone number, overall state, and media channel state.

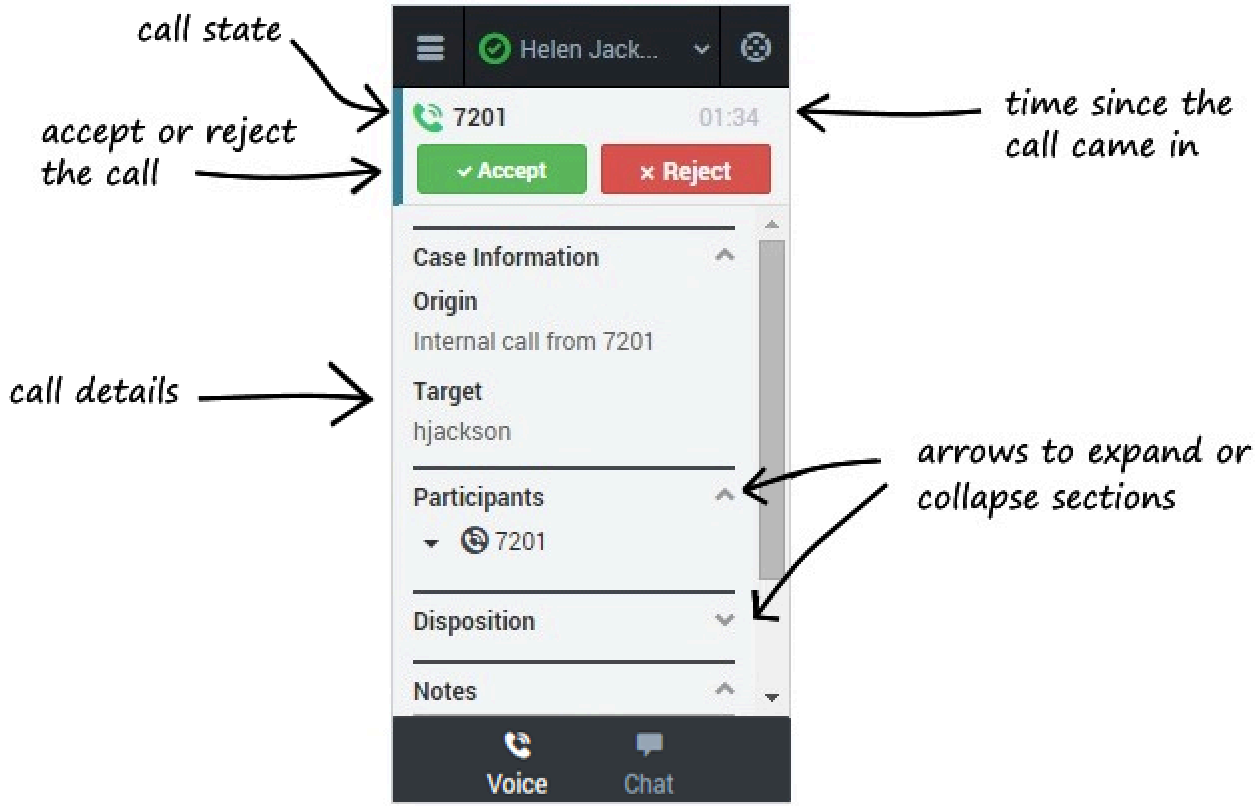
You can update your status on all channels that you are logged into or update your status on a single channel:

- To update your overall status, click the agent status bar, and select a new status.
- To update your status for a particular media channel, click the main menu, select **Channels** to see the list of channels, click the white agent status box, and then select a new status from the list.

For more information about changing your status, including a video that demonstrates how to do it, see Changing Your Status.

Now you are ready to handle customer interactions.

How do I handle customer interactions?



When a call, chat, or email is directed to you, you'll receive a "toast" pop-up in the bottom right-hand corner of your screen. You might also hear a sound.

To answer the call, click **Accept**. (If you do not accept, it will go to the next available agent and your status will change to **Not Ready**.)

- Go here to learn about handling **calls**.
- Go here to learn about handling **chats**.

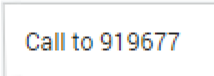
To get you started, here are some common call handling features:

 places the caller on **hold**.

 **restores** the call.

 instantly **transfers** the call to a contact that you select.

 **ends** the call.



calls back the participant who was disconnected from the active call. You can call back a disconnected participant by using the Participants menu.

Your organization might require you to note a reason for the call (or a *disposition*). If so, after the call is complete, click **Disposition** and select one of the items from the list. Click **Mark Done** to complete the interaction.

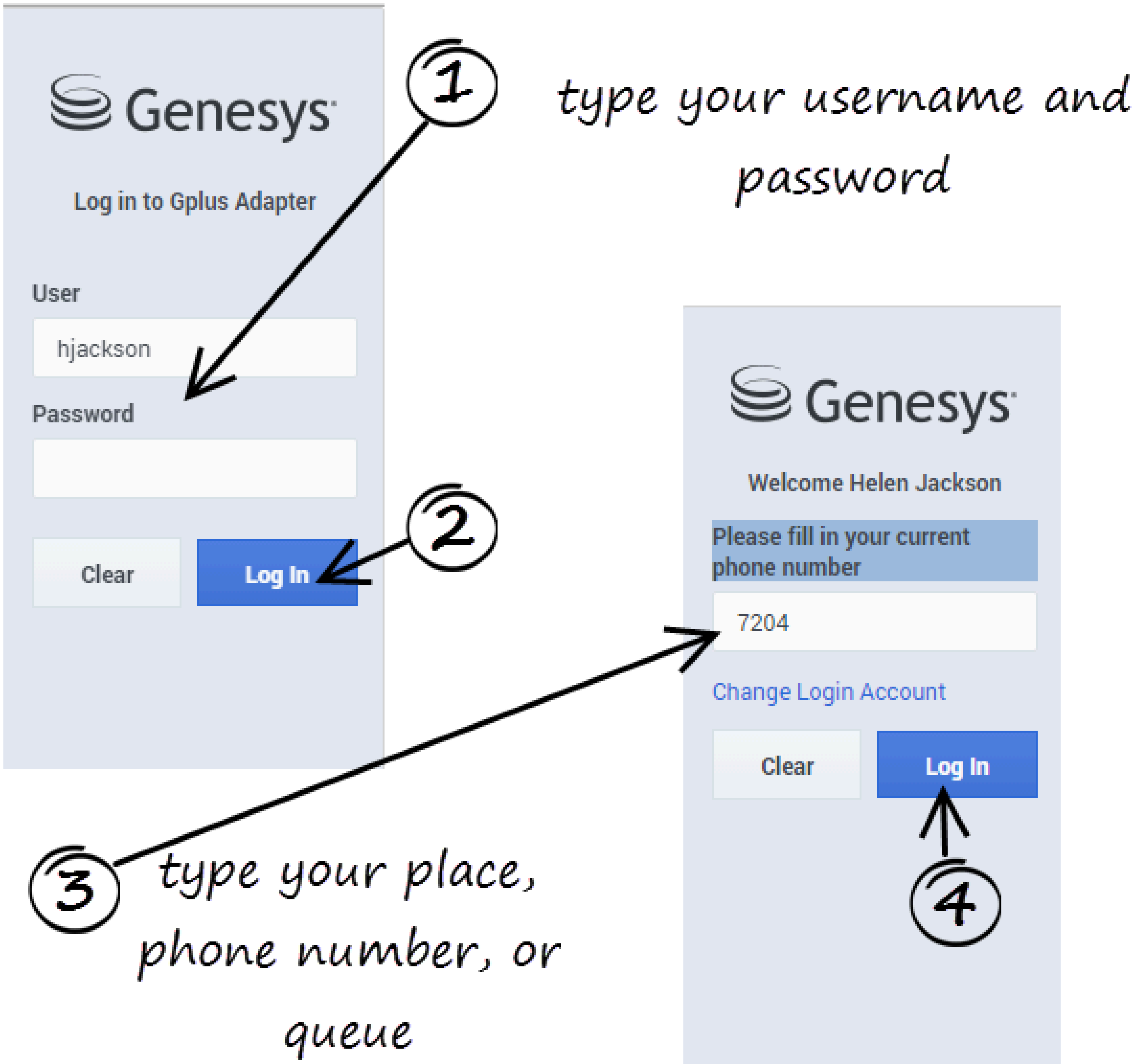
Depending on how your organization is set up, you might now enter an **After Call Work** state. This is a period of time during which you remain in a **Not Ready** state to allow time for completing other tasks related to the call. When this period ends, you automatically return to a ready state and can again receive calls.

Logging in

The Adapter is either in the left pane of the Customer Relationship Manager (CRM) window or you can launch it by clicking **Phone** in the bottom right corner*Italic text* of the screen—it's one or the other, depending on how your administrators have configured the CRM in which the Adapter is implemented. If your CRM is configured for single sign-on, you don't need to log into your Gplus Adapter and when you launch the Adapter, you'll have immediate access. If your CRM isn't configured for single sign-on, you are prompted to log in.

If your Adapter is located in the bottom right of the screen, you can undock the Adapter by clicking the arrow at the top right of the Adapter. This opens the Adapter in a new browser window that you can resize and drag to a new location. If you want to redock the window, just click the arrow again and the window returns to the standard location.

How do I log in to the Adapter?

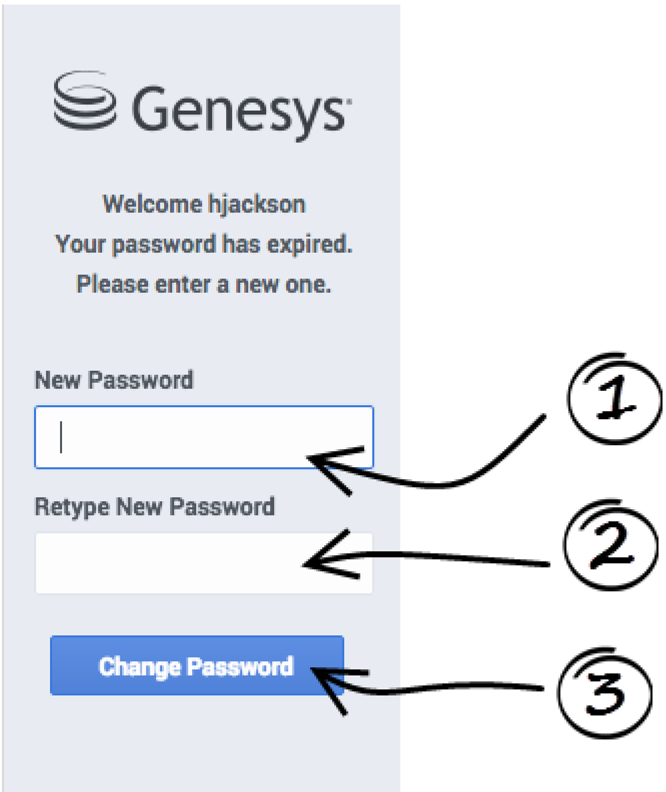


If you are prompted to log in, enter your Genesys username (such as an email address) and password and click **Log In**. If you have logged in before, your username is already be entered for you.

Depending on how your administrator has configured the Adapter, you might also see a secondary login page where you're prompted to enter the name of a place, a phone number, or enter a queue.

If you have logged into the Adapter before, the login page automatically enters your last known place. Most often, you can accept the last known place. If you have changed your place, phone number, or queue, you must update the field before you click **Log In**.

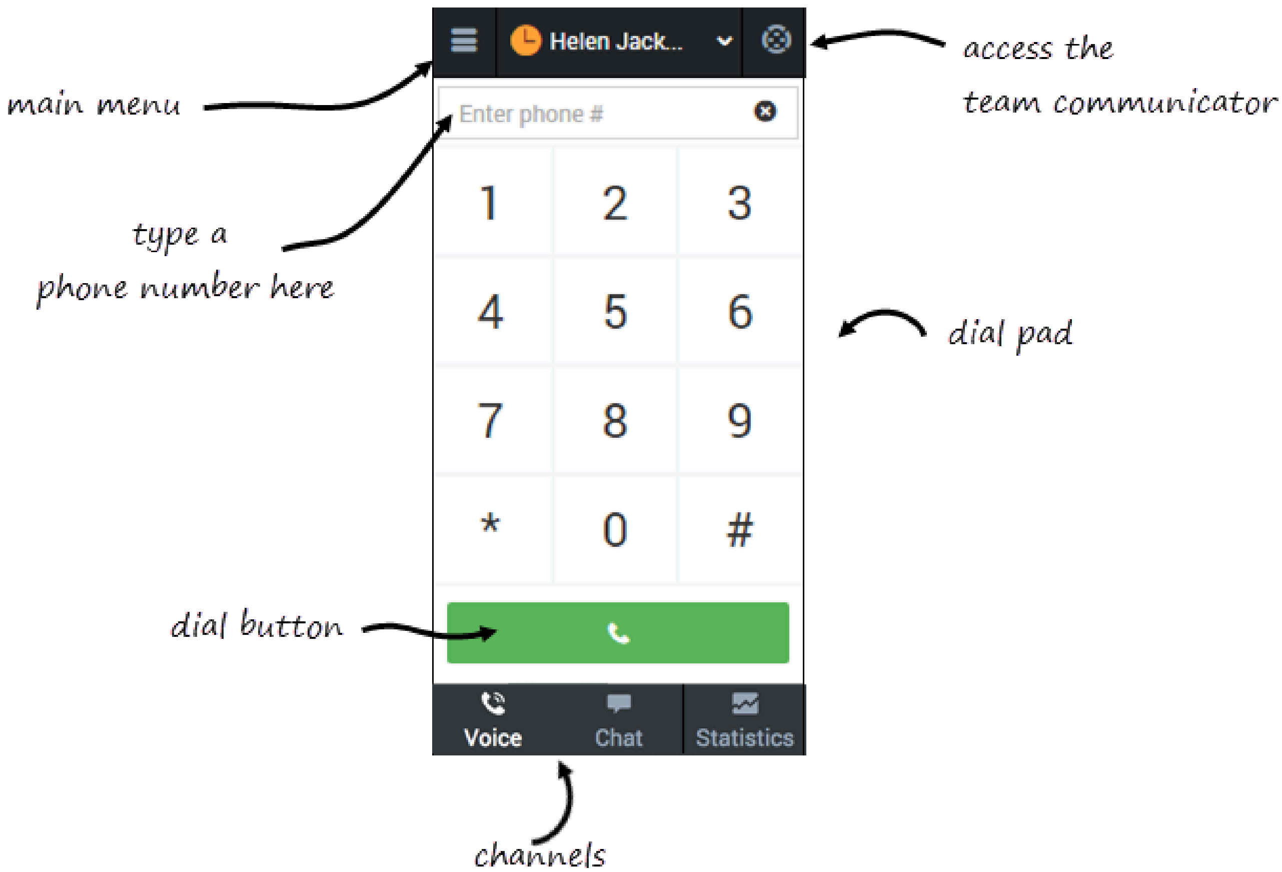
Changing your password



If your password has expired, you are prompted to change your password.

If needed, contact your administrator for password rules.

Adapter main view



After you log in, the main view is displayed. This default main view is set up by your system administrator and can be either voice (the telephone dial pad) or statistics view.

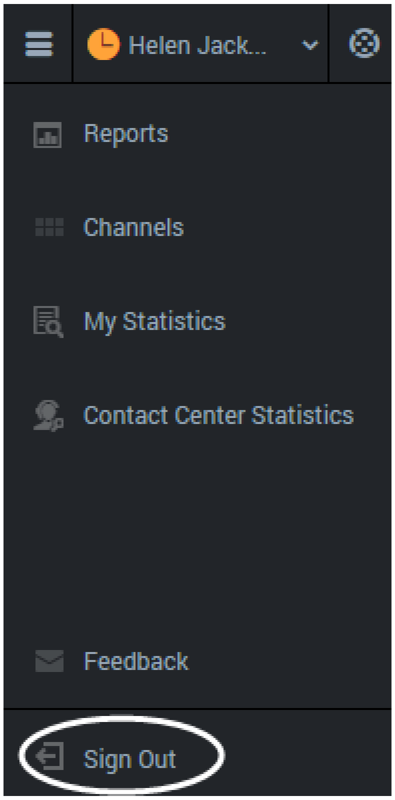
From the default main view, you can change your status, navigate among your channels, and make a call by using Team Communicator or the **Dial Pad** tab.

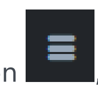
When you first log in, notice that your agent status is set for you; for instance, **Not Ready**. The default state is determined by your system administrator. If your status is not already set to ready, change your status to **Ready**.

Tip

After refreshing the page or after a call is completed, you must click anywhere within Salesforce or the Adapter. If you don't, screen pop might fail to occur.

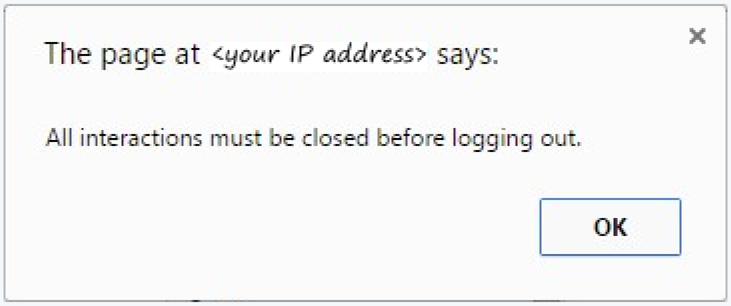
Logging out



To log off all channels and sign out of Gplus Adapter for Salesforce, click the menu button , and then select **Sign Out**. The Adapter returns you to the login page, where you can enter your credentials again, if needed.

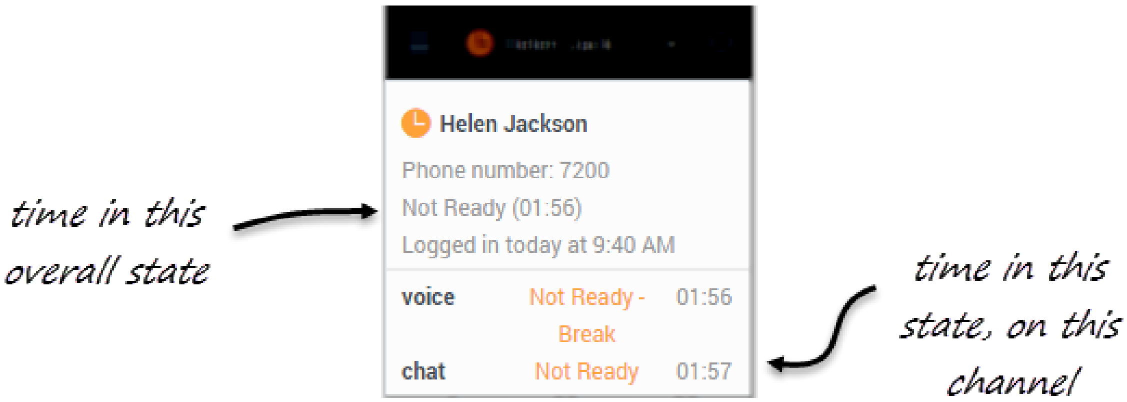
When you log out, all interactions are terminated and do not resume when you log back in again; therefore, ensure that your interactions are complete before logging out and closing your browser window.

> ### Tip
> You can't sign out if you have any active calls. If you try, the following error message is displayed. You must click **OK** before you can continue working with the Adapter.


The page at <your IP address> says:
All interactions must be closed before logging out.
OK

Changing your status

You can see your status in the Gplus Adapter for Salesforce on the agent status bar at the top of the Adapter. You can also hover over the status bar with your mouse to see more details about login time, phone number, overall state, and media channel state.



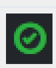
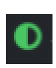
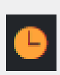
Changing your status on a channel

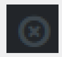
Link to video

When you change your status, you choose from a list of states set by your administrator. Generally, you'll see **Ready**, **Not Ready**, and **After Call Work**, but you might also see variations of these options with specific reasons.

Here's a table to describe at the status choices you might see in your Adapter:

[+] Show table

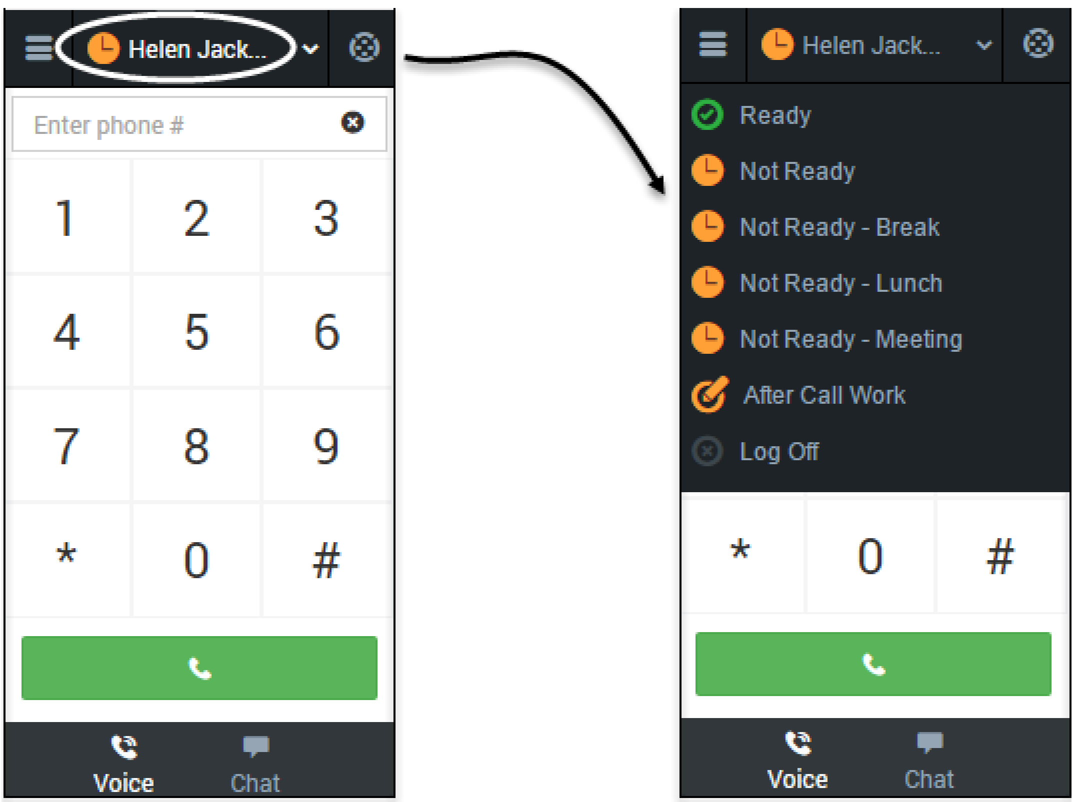
Status	Icon	Description
Ready		You're ready to start accepting calls.
Mixed status		Your status is **Not Ready** on at least one of your logged-in channels.
Not Ready		You're not ready to accept calls. You might also see options such as **Not Ready - Lunch**.
After Call Work		You're not ready to accept calls because you're completing some admin duties for a previous call. You might also see options such as **After Call Work - Verification**.

Status	Icon	Description
Log Off		Log off all channels. You can log off all channels on your Adapter and still remain logged into the Adapter.

Your environment might be configured to automatically change your status in the following situations:

- When a call ends, your status might be set to **After Call Work**.
- When you click **Mark Done**, your status might be changed from **After Call Work** to **Ready**, **Not Ready**, or some other value.

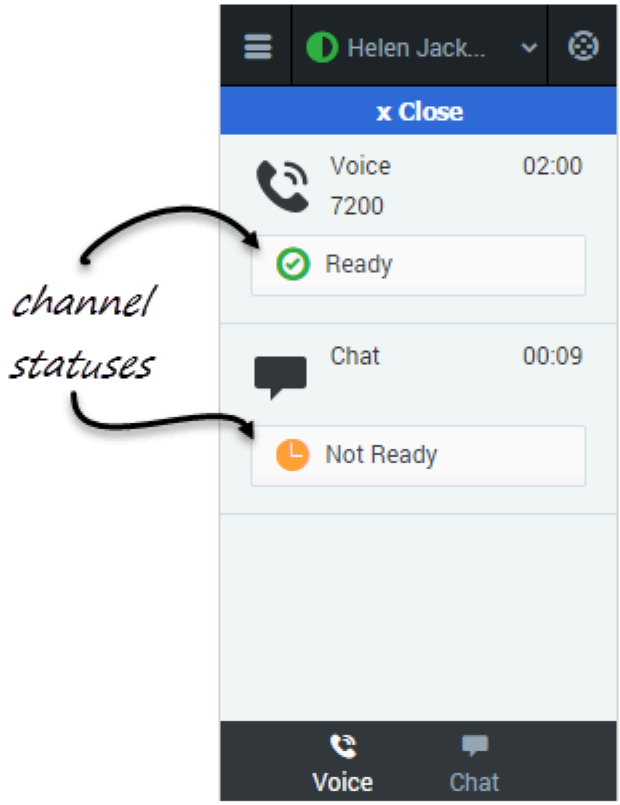
Updating your overall status



If you're logged in to multiple channels, selecting a new status from the status bar changes the status across all channels. Your overall agent status considers only the status of the channels that you are logged into. For example, if you are logged into the voice channel and in **Ready** state, but not logged into the chat channel at all, your global agent status indicates that you are in a global **Ready** state.

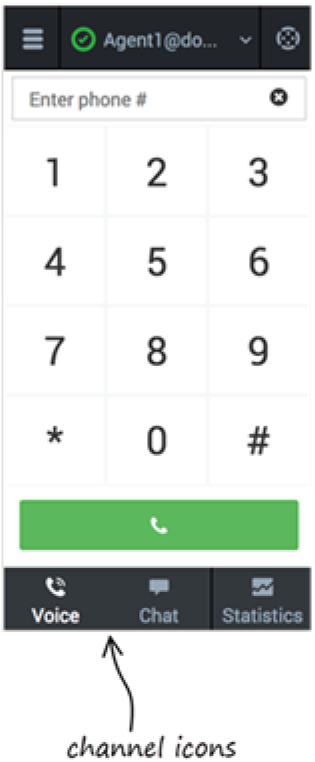
To update your overall status, click the agent status bar, and select a new status.

Updating your status on a single channel



To update your status for a particular media channel, click the main menu, select **Channels** to see the list of channels, click the white agent status box, and then select a new status from the list.

Navigating to a channel



You can navigate to a different media channel in the Gplus Adapter for Salesforce by selecting the channel icon at the bottom of the Adapter.

You can also view details about all your channels through the main menu: click **Channels** to see the list of channels that you're configured to use. You can use the channel list to change your status on a particular channel.

Also, you can view the Contact center statistics by selecting the statistics icon at the bottom of the Adapter.

Changing your password

For security reasons, it is wise to change your password regularly. Your contact center administrator might have configured your Adapter to prompt you to change your password on a regular cycle. However, you can also change your password whenever you feel it is necessary.

> **Important**
>
> - If you don't see the **Change Password** option in your main menu, this feature is not applicable to you because your contact center is not configured to allow you to change your password at will.
> - If you are changing your password because your password has been compromised, contact your administrator or network security specialist.

How to change your password

Link to video

1. Click the menu icon .
2. Click **Change Password**. The following warning message is displayed:
   ```
   You will be logged out of the application.

   Once the password is changed, you will be logged in automatically.

   Are you sure you want to proceed?
   ```
3. To proceed, click **Change Password**. You are now logged out of the application.
4. On the **Change Password** screen, type the following information:
   - **Old Password**: This is your current password.
   - **New Password**
   - **Retype New Password**: Ensure that the value in **Retype Password** matches the value **New Password**.
5. Click **Change**.

After you click **Change**, you are logged back in using your new password.

Handling calls

The Genesys Gplus Adapter provides you with controls and features that let you handle voice interactions with contacts or internal targets (such as other agents).

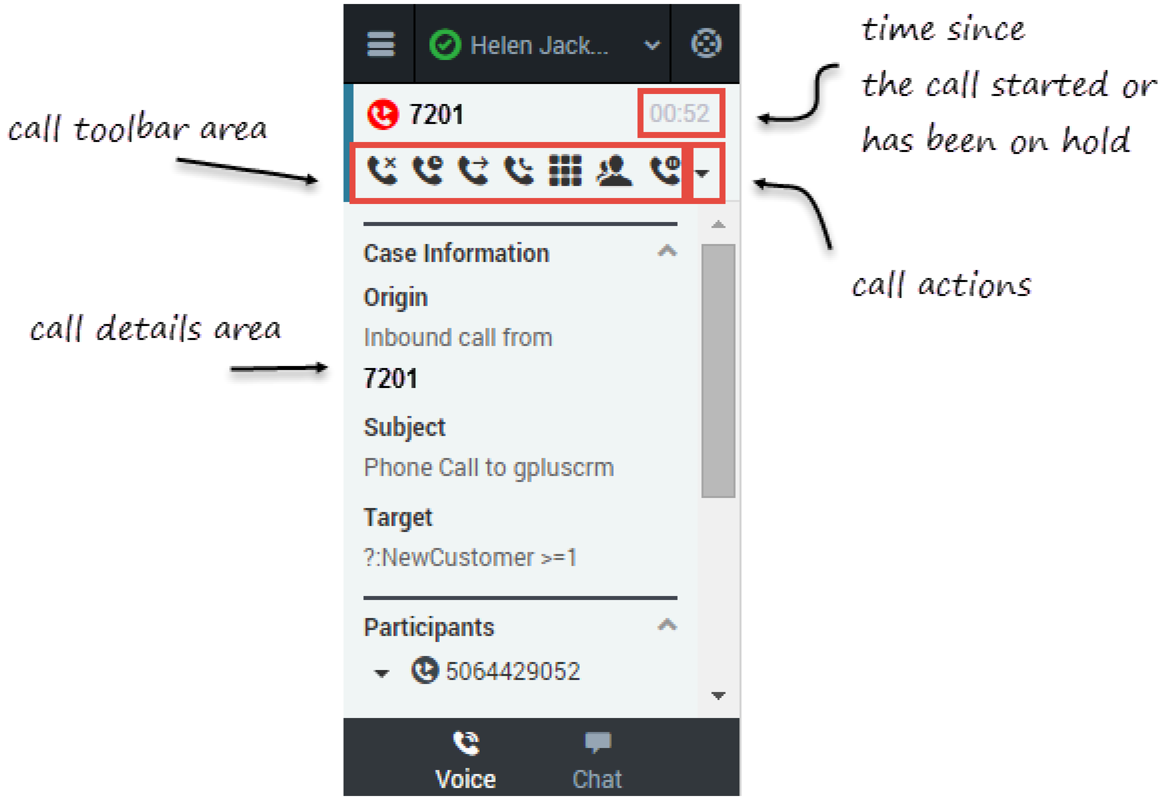
How do I handle calls in the Adapter?

Link to video

When you navigate to the voice media channel, you'll see the default view where you can:

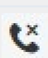
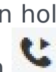
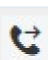
- Handle an incoming call
- Dial a call
- Transfer a call
- Perform an instant conference call
- Initiate a consultation
- Call back a disconnected party
- Record a call

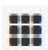
Adapter main view



Once you have an active call—because you called someone or someone called you—the main voice channel view changes to the call view. This view has two main areas: call toolbar and call details.

When you have an active call, the call toolbar displays icons for actions that you can perform during a call. Depending on the Adapter configuration, you might see some or all of the following toolbar icons:

Icon	Description
	Ends the call.
	Places the call on hold. After the call is hold, the **Retrieve** button  is displayed. Tip If your contact center is configured to display hold time duration, the call timer in the top-right of the Adapter window resets to display how long your call is on hold. When you take the call off hold, the timer returns to showing the duration of the call again.
	Redirects the call to another contact you select using Team Communicator. See Transferring a Call

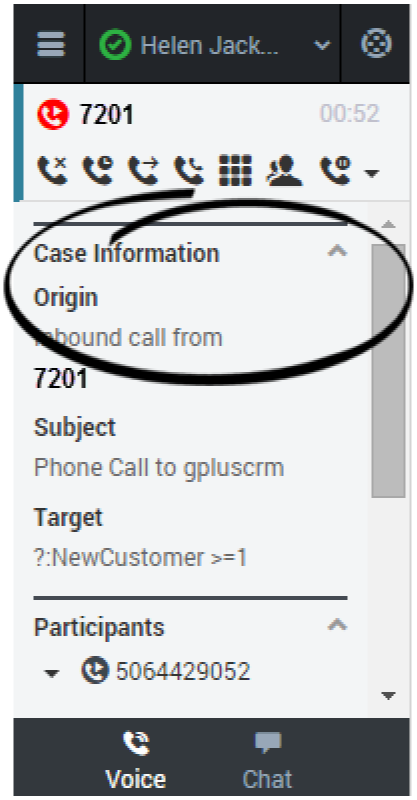
Icon	Description
	for details.
	Starts a voice conference instantly with the current caller and another contact that you select using Team Communicator. See Performing an Instant Conference for details.
	Starts a voice conference instantly with the current caller and another contact that you select using Team Communicator. See Performing an Instant Conference for details.
	Shows the keypad. You can use this to enter digits when you're navigating voice menus or prompts. Type or select the digits, and then press **Enter** on your keyboard.
	Starts a consultation with another contact before transferring or conferencing the call to that contact. See Initiating a Consultation for details.
	Pauses call recording. See Recording a Call for details.

Call details

The call details view shows you all the data the Adapter has about the call, and it provides fields that you can edit to add more information:

- Case information
- Participants
- Disposition
- Notes

Case information



The Case Information section shows you read-only information about the call—the exact information is determined by your administrator.

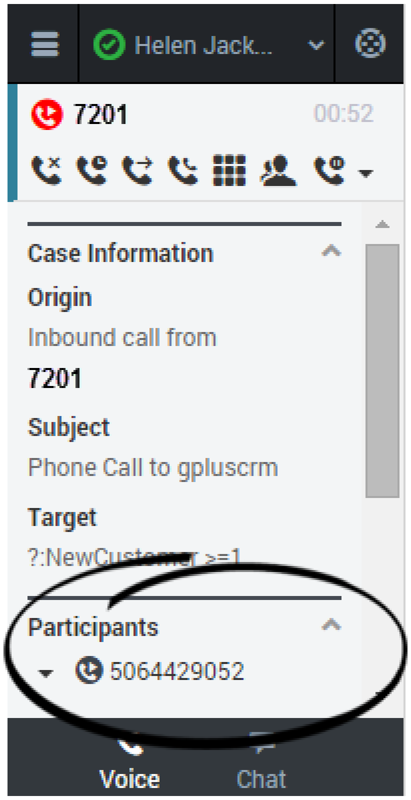
Here are a few examples of information you might see in your case information view:

- Origin
- Target
- Contact name
- Call type
- Account information
- Subject

Depending how your administrator configured your agent, you might be able to add, edit, or delete case information. For more information, see How Do I Edit Case Information?

Case Information fields might can contain a URL that you can click to access more information.

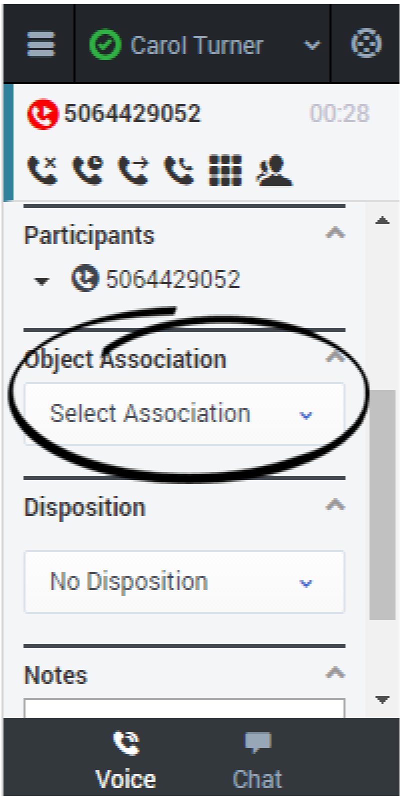
Participants



The Participants section shows you read-only information about who else is on the call and the state of the participant (Ringing, Connected, Ended, and so on). This section is especially helpful when you're trying to keep track of who is participating in a conference call.

From the Participants section, you can also call back a participant who was disconnected from the current call. To call back, expand the **Participants** menu, hover over the participant number and click **Call to** action. The call is established as a normal outbound call.

Object association



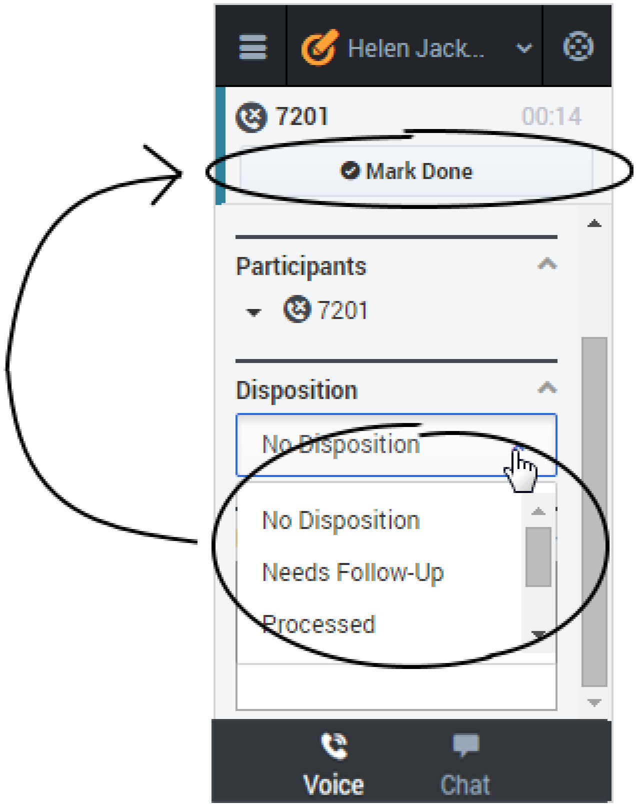
During a call or as part of your after-call work, you can associate the interaction with a Salesforce object, such as a customer record. The **Object Association** menu lists options that are related to the object tabs that are displayed in Salesforce. To understand the connection between the **Object Association** menu and Salesforce objects, consider this scenario:

1. You accept a call from John Smith. Salesforce automatically displays John Smith's information in a tab. In the Adapter, **John Smith** becomes an option in the **Object Association** menu.
2. You then open another Salesforce tab to display information about another customer named Willard Clinton. In the Adapter, **Willard Clinton** is added as another option on the **Object Association** list.

Important

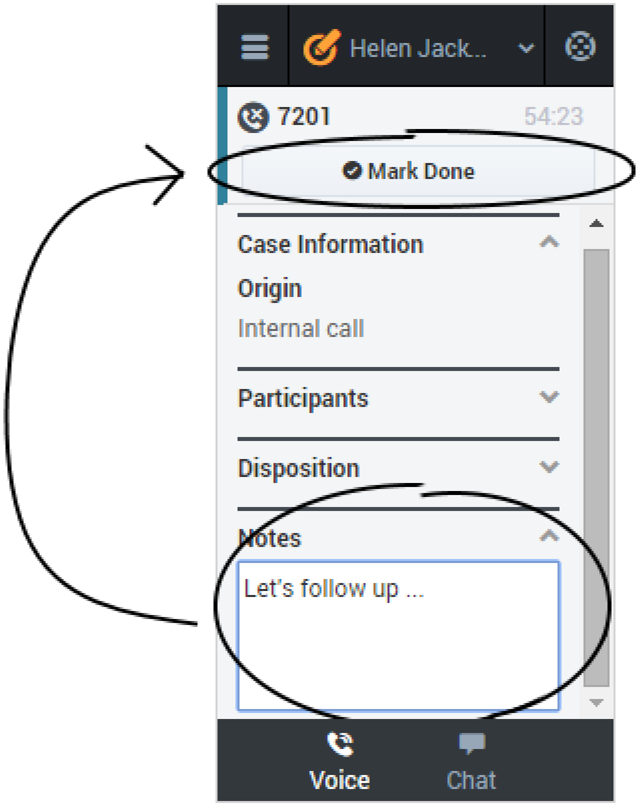
- If your contact center does not permit you to edit case data, the **Object Association** menu is not displayed.
- Avoid opening the Adapter in multiple browser tabs. Object association works only in a single browser tab.

Disposition



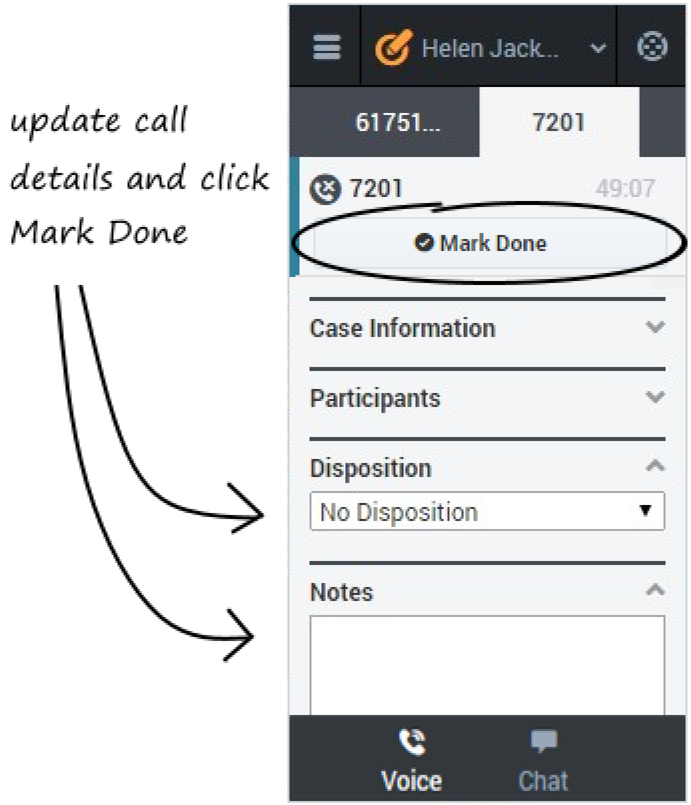
If configured by your administrator, you can change the disposition for a call either during the call or as part of your after-call work. You can use this field to record the business outcome of the call. To update, click the drop-down list, and then select a disposition. Ensure that you don't click **Mark Done** first before you select a disposition. You can't make any further changes after you click **Mark Done**.

Notes



If configured by your administrator, you can add notes either during the call or as part of your after call work. To update, just enter your comments in the text field. Ensure that you don't click **Mark Done** first before you add a note. You can't make any further changes after you click **Mark Done**.

Finishing a call



When your call is over, either because the other party left the call or you clicked **Hang up** , you might need to update some information in the call details area (such as disposition or notes). Your Adapter might be configured to automatically change your status to **After Call Work** to give you time to complete this task; if not, you can change the status yourself. Your Adapter might be also configured to automatically mark the call as done as soon as the call is over.

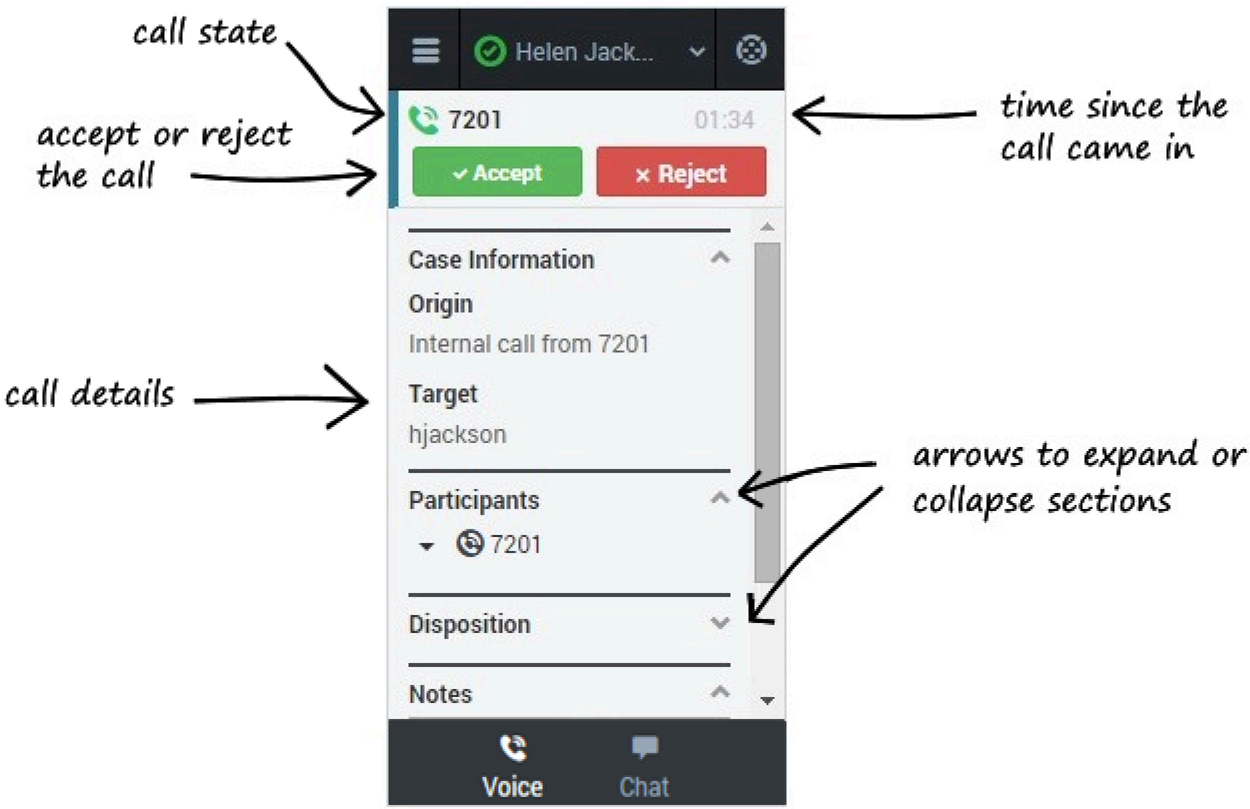
After you finish your after-call work, you can click **Mark Done**, which completes the call and sends you back to the main voice channel view. At this time, your status might automatically change to **Ready**, **Not Ready**, or some other value; otherwise, you have to change it yourself.

If you are finishing multiple calls, just click the tab for a call, enter any necessary information in the call details area, and click **Mark Done**. Then, move on to your next call tab.

Answer incoming calls

You can start receiving calls as soon as you set your status to **Ready** on the voice channel in the Gplus Adapter for Salesforce.

How do I accept a call?



When you get a call, the Adapter's incoming call screen displays. You can **Accept** or **Reject** the call, see the amount of time since the call came in, and see the call's state. You also see the call details area, which displays sections for Case Information, Participants, Disposition, and Notes. You can review this information before deciding whether to accept or reject the call. Take a few moments to identify the components of the incoming call screen.

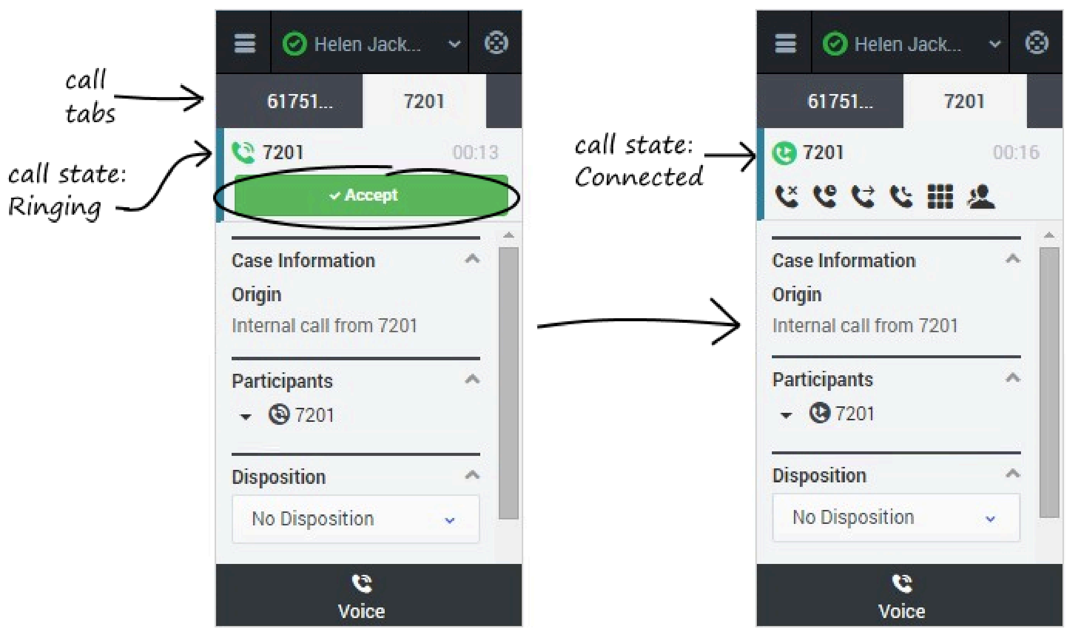
Another visual indicator that you have calls waiting is a red circle with a number displayed on the **Voice** icon at the bottom on the Adapter. The number indicates how many invitations are pending. This is useful for when incoming calls are waiting for you while you are on another screen in the Adapter or working in another channel.

If you reject the call, you'll be taken back to the main view for the voice channel. If you accept the call, you'll see a list of Call Actions you can take in the call toolbar area.

> **Important**
>
> If your administrator has configured it, you might also see related information about the caller in Salesforce. This information might be displayed either while the call is ringing or after you click **Accept**. For example, if the caller already exists in the Salesforce contact database, you might see the Edit Contact screen.

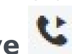
You can work with the standard call actions, or you can modify the call data by setting the disposition or adding notes about the call.

How do I accept a second call?



While you're on an active call, you might get another unrelated direct call from someone else. If this happens, the Adapter opens a new tab and shows you the same call overview information with the option to accept.

> **Tip**
>
> You don't see **Reject** in this scenario because rejecting a call puts it back in the system so it can be routed to another available agent. We don't want that to happen if someone is trying to call you directly.

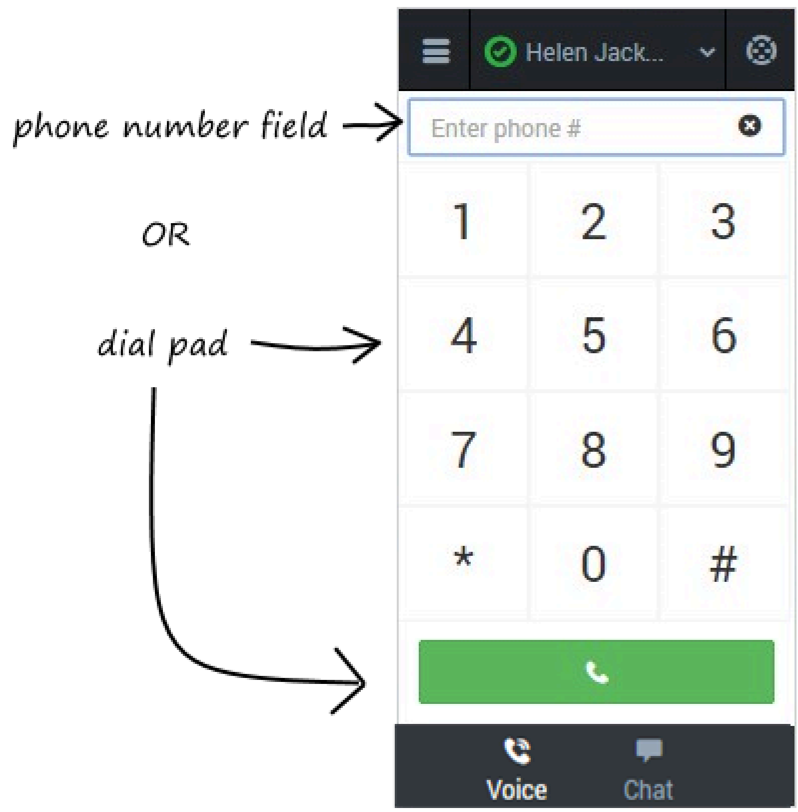
As soon as you accept the new call, the Adapter puts your original call on hold. You can go back to your original call by selecting the corresponding tab and clicking **Retrieve**  —this puts your second call on hold. If you have more than two active calls, the rest are displayed in a dropdown list next to the tabs.

Dial a call

You can use the Gplus Adapter for Salesforce to make calls to contacts by using the dial pad, using Team Communicator, or using click-to-dial.

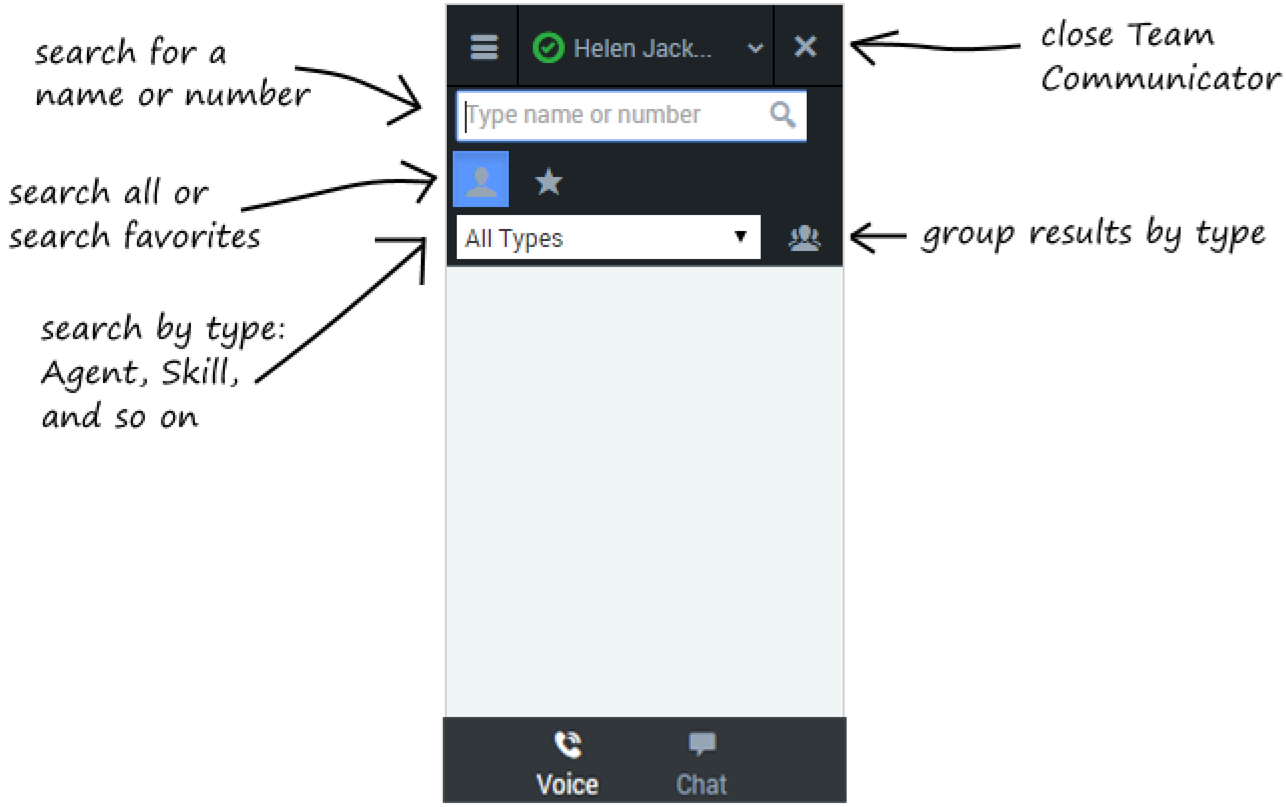
In some contact centers, you can choose a Caller Identification to be displayed on the phone of the contact that you are calling.

Using the dial pad



Making a call by using the dial pad is simple—just click the numbers you want to dial (or enter them manually in the phone number field) and click **Dial**.

Using the Team Communicator

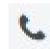


Team Communicator is a powerful tool you can use to search for contacts within your organization or outside your organization and then start a call with that contact. The types of contacts that are available to you in Team Communicator are configured by your administrator — you might not see all the fields and buttons that are described in this section. Your administrator might have added some commonly-used contacts to your favorites list, but you can also add your own favorites.

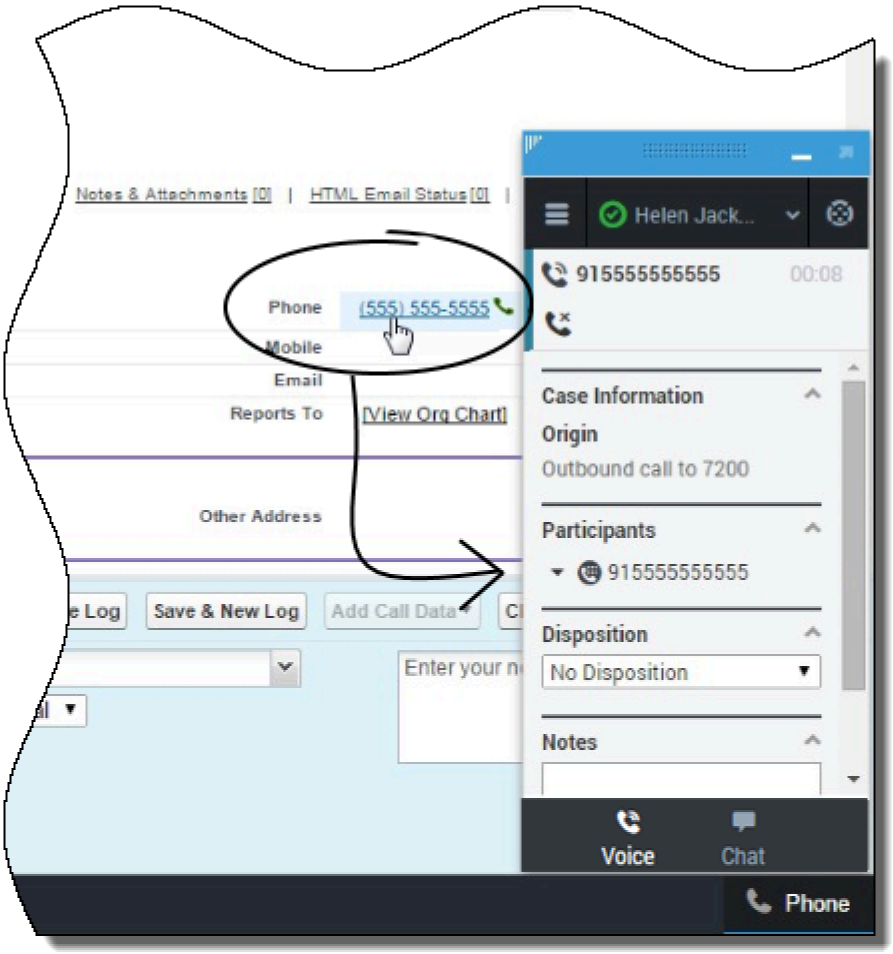
To open the Team Communicator, click **Team Communicator** .

There are many ways to use Team Communicator:

- The simplest is if you know the number of your contact, then you can type it in the text area and press **Enter** on your keyboard to immediately start a call.
- You'll probably use Team Communicator primarily to search for contacts. To get started, just type a name in the text area — as you type, Team Communicator suggests known agents, contacts, and other resources. You can also group your results according to type by clicking **Show Types** . You can collapse these groups by selecting the arrow next to the group name.
- You can also search through your favorites, configured by your administrator, to find a contact to call.
- Finally, you can search for contacts by Skills, Groups, and so on, which can be helpful when you need to call any agent with a particular skill—for example, you might need to transfer a call to an agent who speaks a particular language.

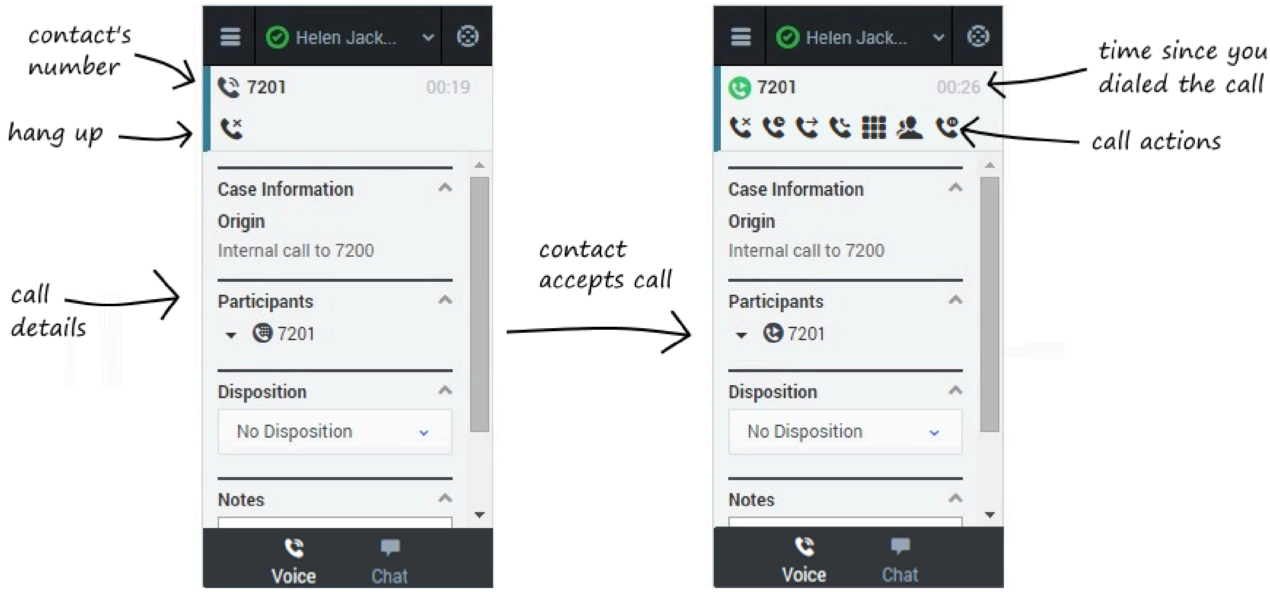
When find a result that you want to contact, just click **Call**  next to the name and your call will start.

Using Click-to-Dial



With click-to-dial, all you have to do is click a phone number within Salesforce and the Adapter automatically dials it and starts the call. For example, you might search for a contact in Salesforce and then click the related phone number.

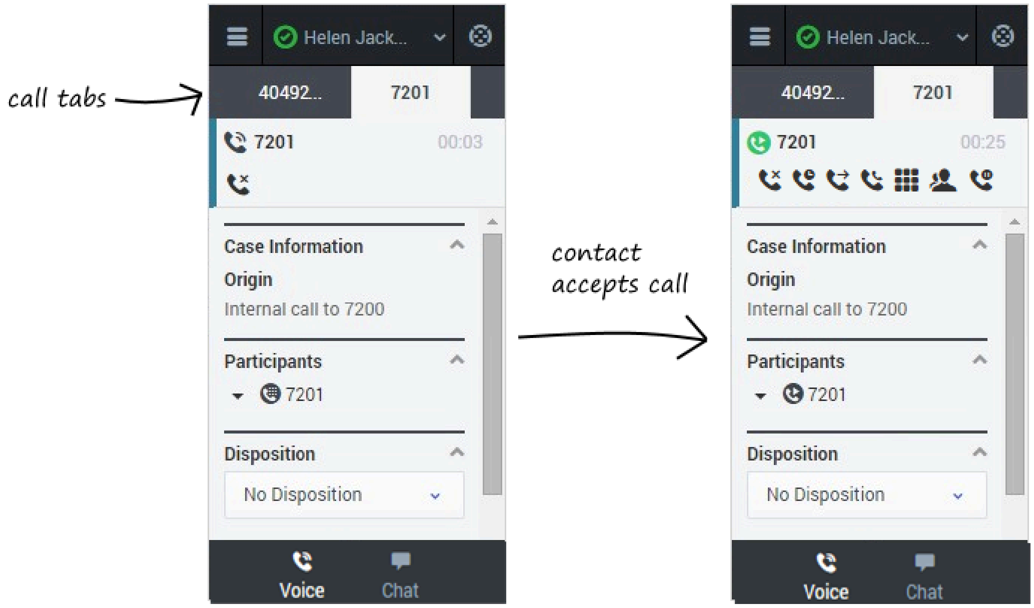
Working with the call



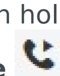
Once you make the call, you'll see two slightly different views as the call transitions from Establishing to Connected. Both views display the call toolbar area and the call details area, which includes sections for Case Information, Participants, Disposition, and Notes.

You can work with the standard call actions, or you can modify the call data by setting the disposition or adding notes about the call.

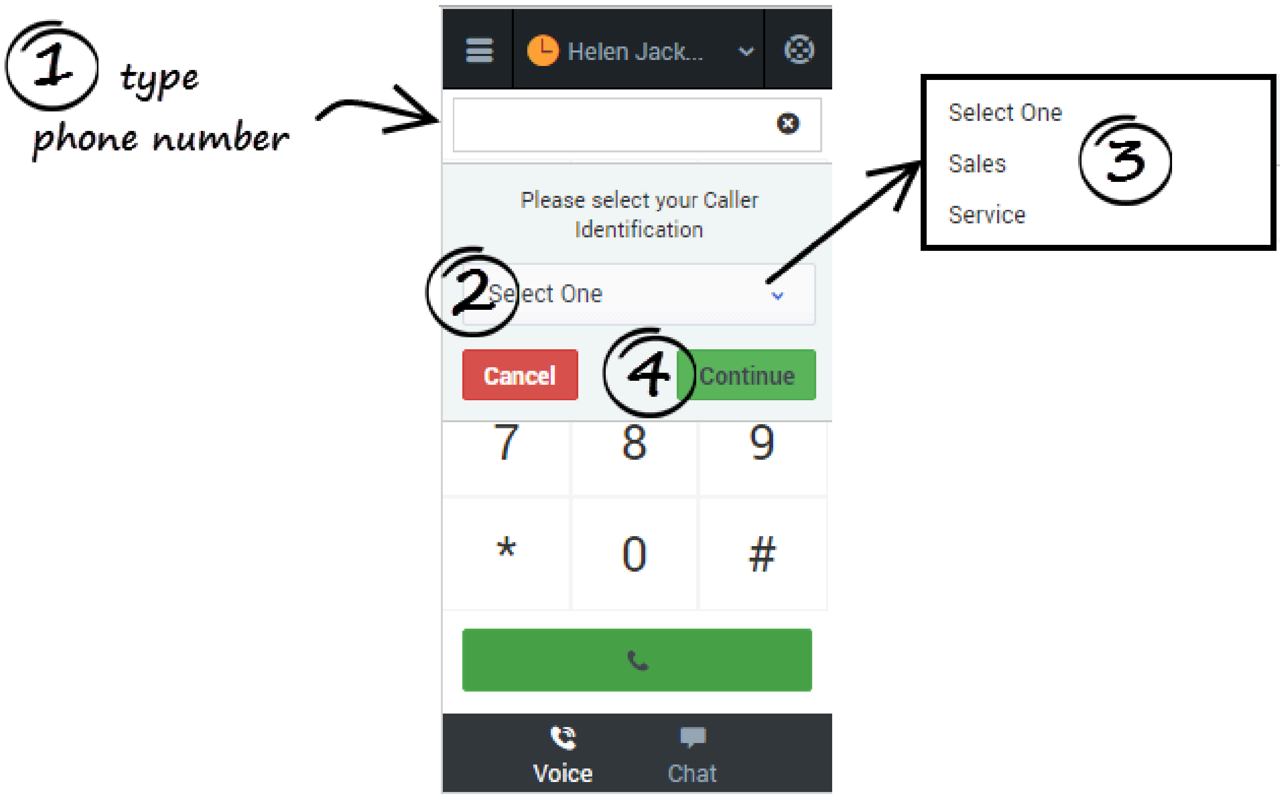
Dialing another call



If you're already on a call, you can use the Adapter to dial a new call.

When you make another call, the Adapter automatically puts your first call on hold. You can go back to your original call by selecting the corresponding tab and clicking **Retrieve**  — this puts your second call on hold. If you have more than two active calls, the rest are displayed in a dropdown list next to the tabs.

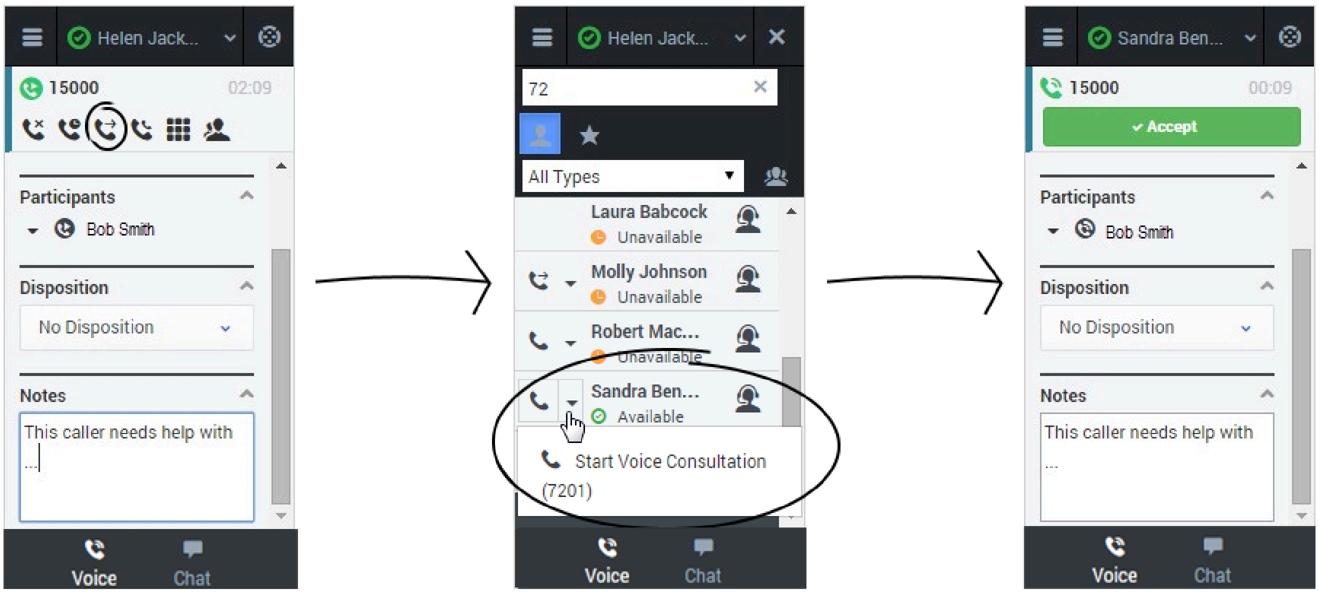
Caller identification for outbound calls



In some contact centers, the agent must choose the caller id that should be used for outbound calls.

If this feature is enabled for your account, when you make an outbound call, the **Please select your Caller Identification** dialog box is displayed. Select the appropriate Caller ID from the predefined list. This number will be displayed to the person receiving your call. The previous Caller ID that you selected is selected by default. Your system might be set up to enable you to hide the caller ID when you make an outbound voice call. If so, the `Anonymous` ID is included in the `Caller Identification` drop-down menu. Ask your supervisor about when to use this feature.

Transfer a call



When you're on an active call in Gplus Adapter for Salesforce, you can transfer your current voice call to another party. The other party might be another agent that you find by searching for them by name, or by the name of an agent group, a queue, a skill, or a routing point. Your administrator will give you a list of queues, groups, and skills to which you can transfer calls. Agent groups might include a different language, specific product knowledge, or a higher level of security clearance.

All you have to do is click **Instant Transfer**  and choose a contact or enter a phone number in Team Communicator. A green status indicator next to the agent or agent group indicates that there are agents available and your customer will not have to wait long for the transfer to go through.

If you like, you can provide some details about the call in the **Notes** field before you click **Instant Transfer**. When the contact sees the incoming call, he or she will also see your notes in the call details area.

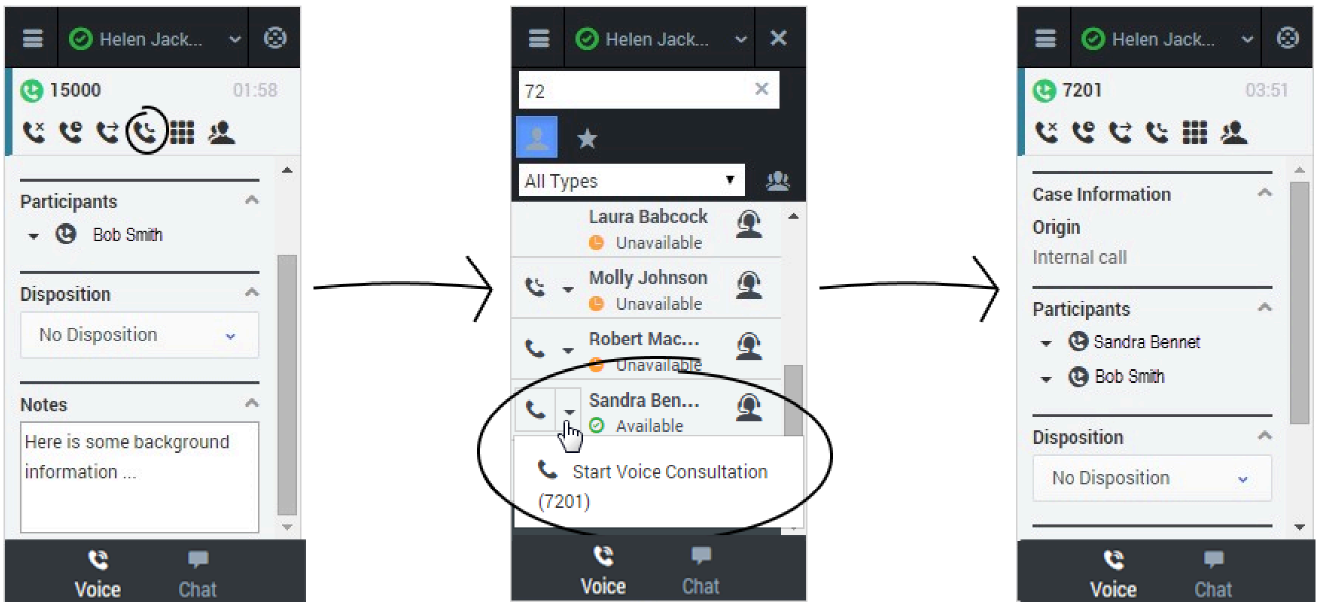
> **Important**
>
> If your administrator has configured it, the transfer target might also see related information about the active call in Salesforce. For example, if the caller already exists in the Salesforce contact database, the agent might see the Edit Contact screen.

You can also perform consultations where you talk to the transfer target before you transfer the call. See Initiating a Consultation for details.

Conference calls

When you're on an active call in Gplus Adapter for Salesforce, you can perform an instant conference call with another contact.

How do I start a conference call?

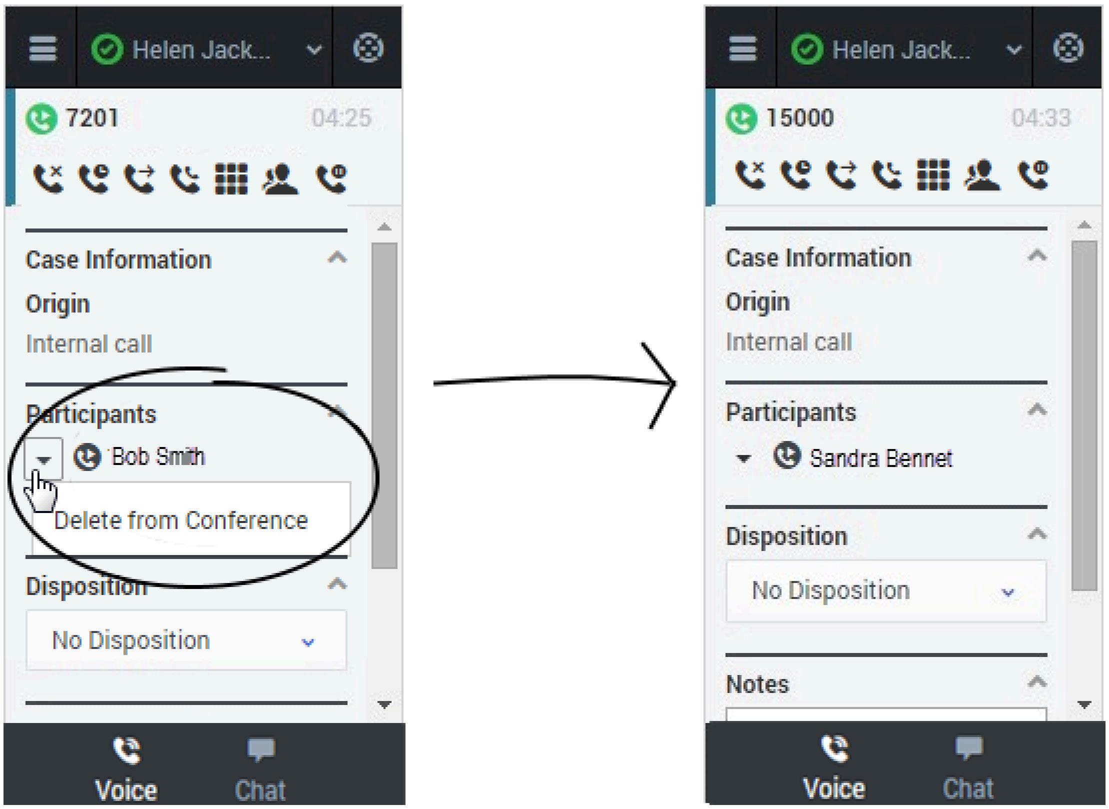


To start an instant conference, just click **Instant Conference**  and choose a contact or enter a phone number in Team Communicator. A green status indicator next to the agent or agent group indicates that there are agents available and you and the customer will not have to wait long for the conference to go through. If you like, you can provide some details about the call in the **Notes** field before you click **Instant Conference**. When the contact sees the incoming call, he or she will also see your notes in the call details area.

Important

If your administrator has configured it, the conference target might also see related information about the active call in Salesforce. For example, if the caller already exists in the Salesforce contact database, the agent might see the Edit Contact screen.

Once the conference is established, you can see the other parties listed in the Participants section. You can remove a participant by clicking the arrow next to the party you want to remove and selecting **Delete from Conference**.

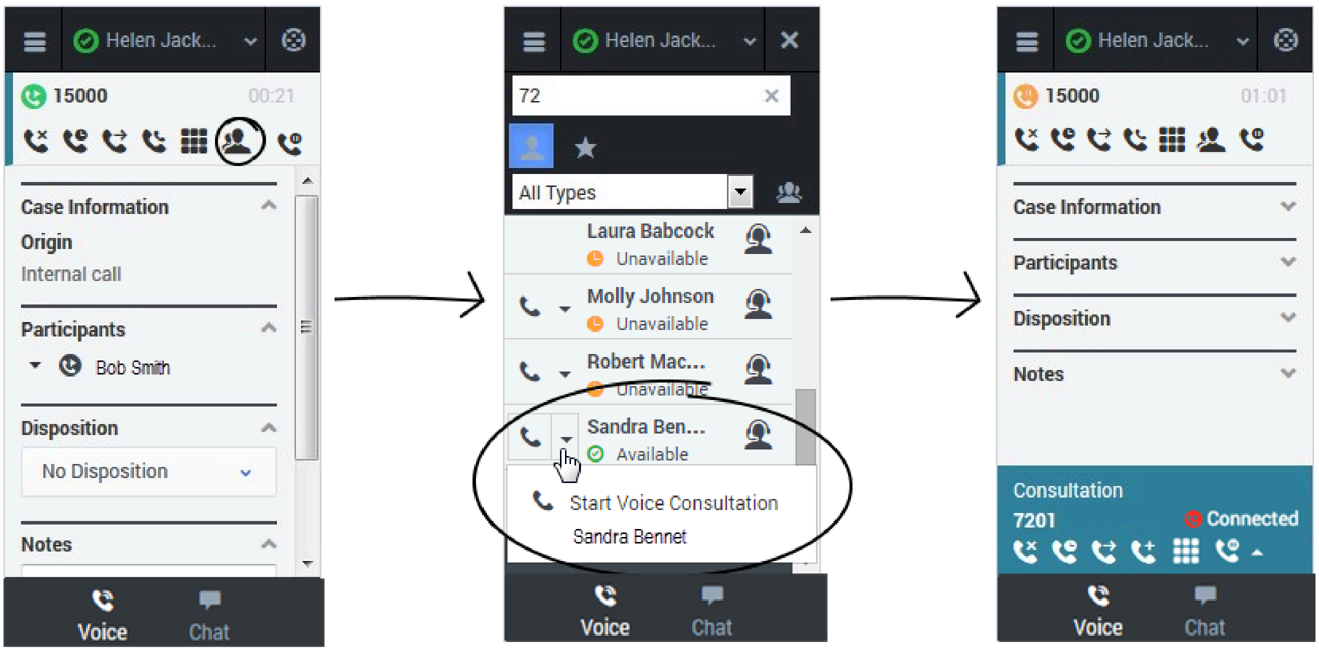


You can also start a consultation and talk with the conference target before performing an instant conference. See Initiating a Consultation for details.

Consultations

When you're on an active call in Gplus Adapter for Salesforce, you can initiate a consultation with another agent at any time.

How do I start a consultation?



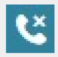
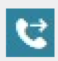
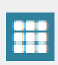
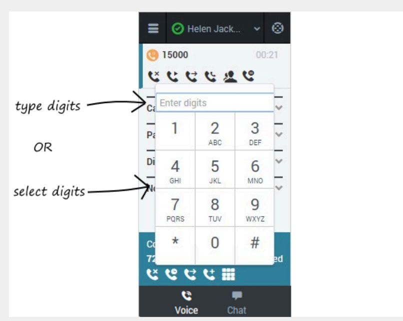
To start a consultation, click **Consult** and choose a contact or enter a phone number in Team Communicator. A green status indicator next to the agent or agent group indicates that there are agents available and you will not have to wait long to start the consultation. The Adapter places your original call on hold and adds a consultation area that includes the consultation call state and a list of consultation call actions.

> **Tip**
> You can easily switch back and forth between your original call and your consultation by clicking **Retrieve** or **Retrieve Consultation** .

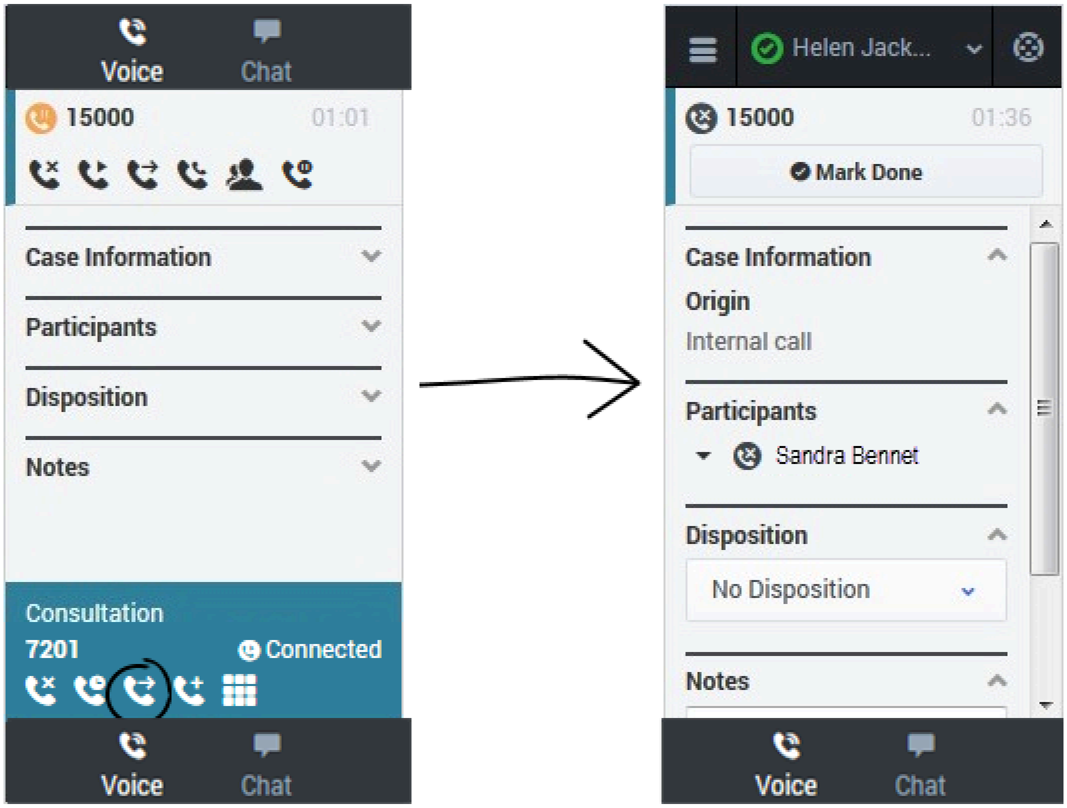
If you like, you can also provide some details about the call in the notes field. This can be helpful if you consult before transferring or starting a conference call. When the target agent sees the transfer or conference request, he or she also sees your notes in the call details area.

When you have an active consultation call, you should see a consultation area with a list of actions you can perform. **Note:** You might not see all of these buttons, depending on how your environment is configured. The following table describes the common buttons you might see in the list:

[+] Show table

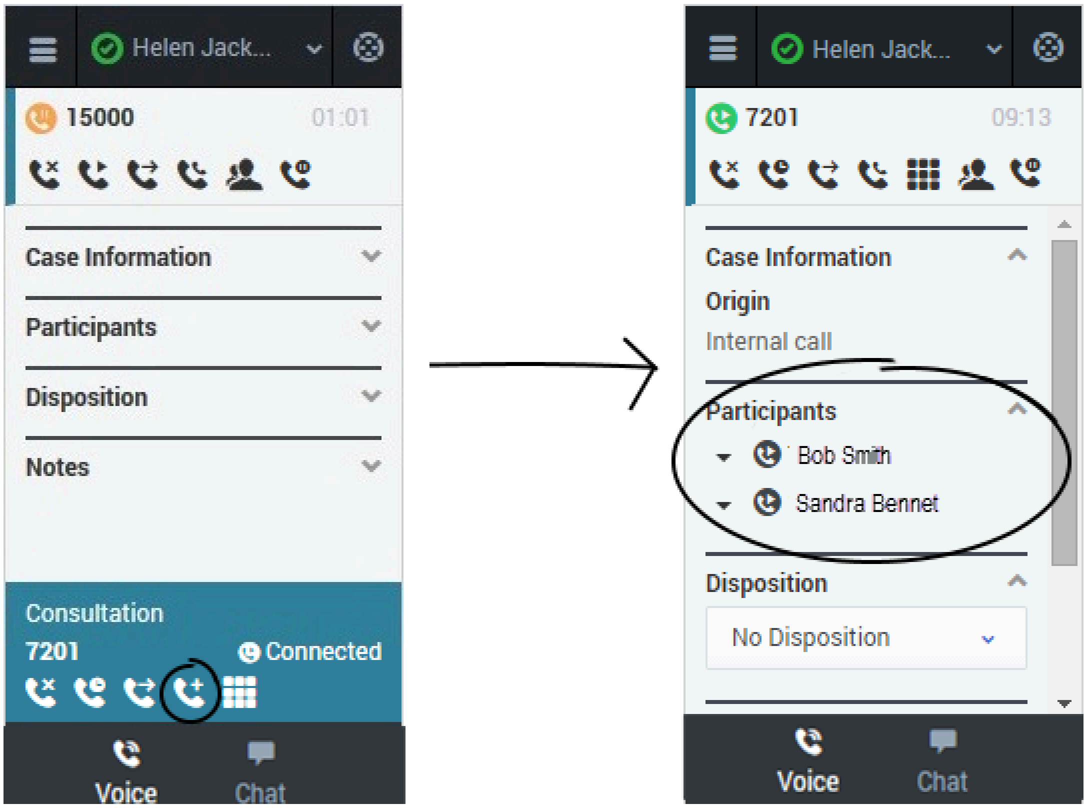
Action	Button	Description
Hang up Consultation		Ends the consultation call.
Hold Consultation		Places the consultation on hold. If you do this, you'll see a slightly different list of actions with a **Retrieve Consultation** button : 
Complete as Transfer		Redirects the call to the consulting agent. See Consult before Transfer for details.
Complete as Conference		Starts a voice conference with the current call and the consulting agent. See Consult before Conference for details.
Keypad		Shows the keypad. You can use this to enter digits when you're navigating voice menus or prompts. Type or select the digits and then press Enter on your keyboard. 

How do I transfer the caller to the consulting agent?



You can transfer your original call to the agent you're consulting with by clicking **Complete as Transfer** . This immediately transfers the call to the consulting agent and ends it for you. As usual, you can add call information and click **Mark Done** to finish.

How do I turn my consultation in a conference call?

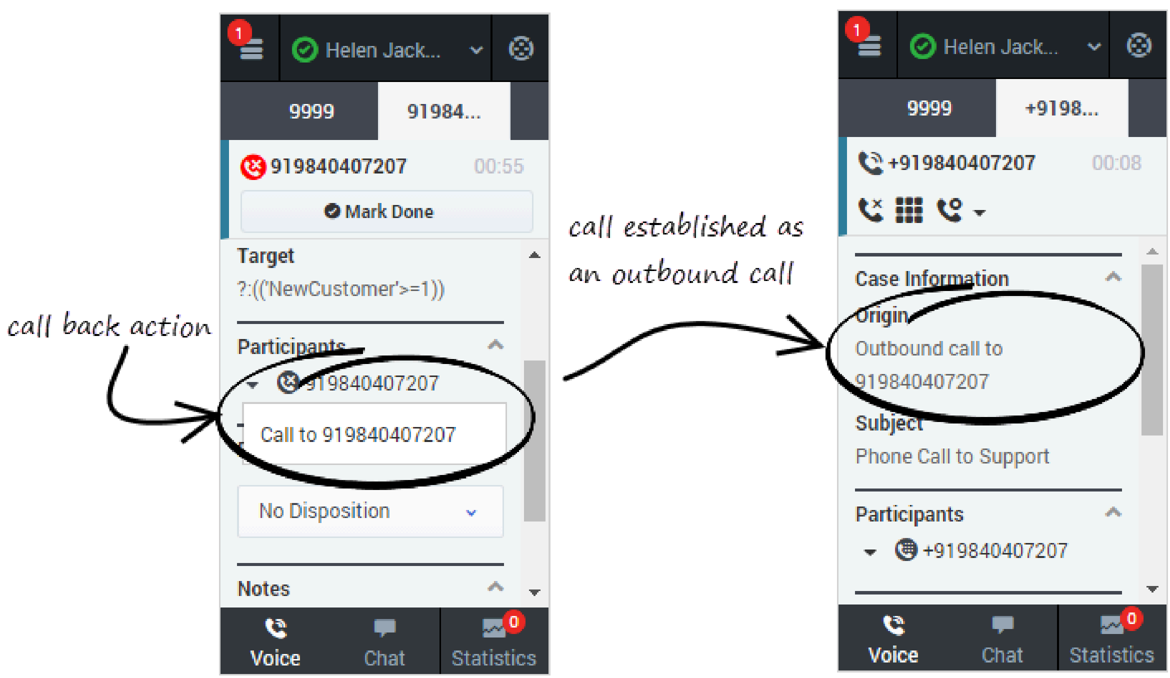


You can initiate a conference call between you, the customer, and the agent you're consulting with by clicking **Complete as Conference** . This immediately retrieves your original call from hold and adds the agent. As with regular conferences, you can remove participants and add call information like disposition and notes.

Call back a disconnected participant

When you're on an active call in Gplus Adapter for Salesforce, you can call back a participant who was disconnected from the current call.

How do I call back a participant?



To call back a participant, expand the **Participants** menu, hover over the disconnected participant's contact number, and just click **Call to** 

action. You can see the call getting established as an outbound call in the **Case Information** section.

Once the call is established, you can see the dialed party once again listed in the **Participants** section. For the called back participant, you can perform general call actions such as conference and consultation.

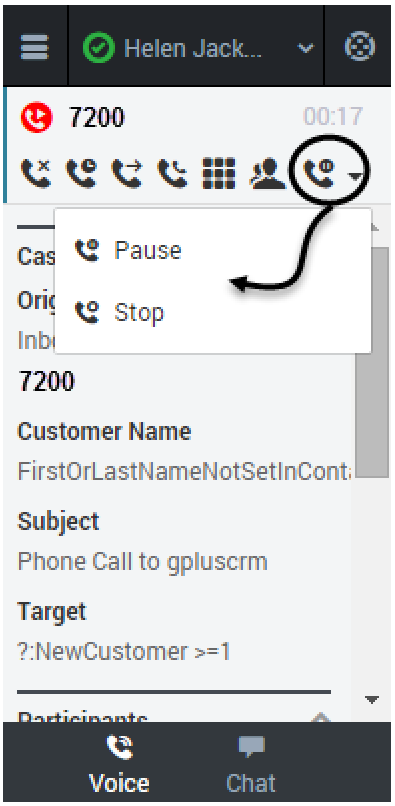
Important

You cannot place a call back for internal calls.

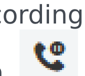
Recording a call

The Call Recording functionality enables you to record the current conversation or consultation call with a customer or an internal caller.

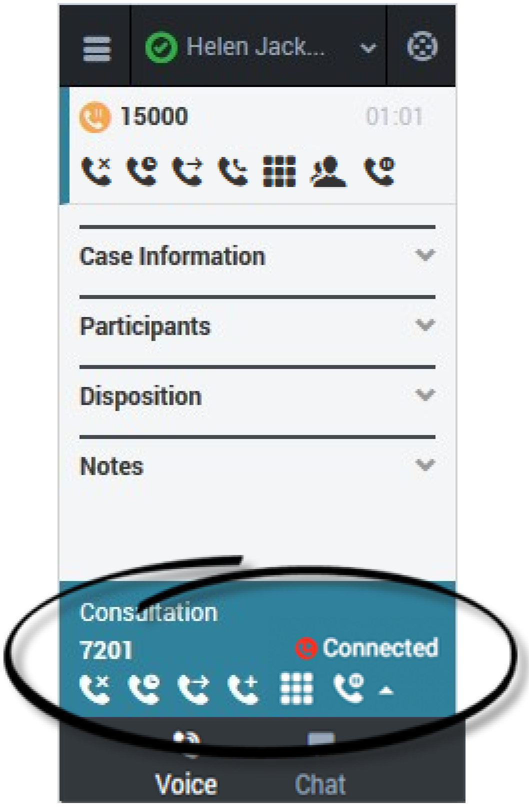
How do I record a call?



To record a call, you click the **Record** button or choose an action from the drop-down list box. Your call center might be configured to record all calls by default. In this case, you can pause, stop, or restart a recording using the Record options. The following table describes the actions that you can perform:

 records the call.After you click the **Record** button, the call status indicator is red . The recording continues until you pause or stop the recording.
 stops the recording. After you stop the recording, the call status indicator is green and the **Pause** button returns to be the **Record** button.  pauses the recording. When you pause the recording, the **Pause** button becomes the **Resume** button.

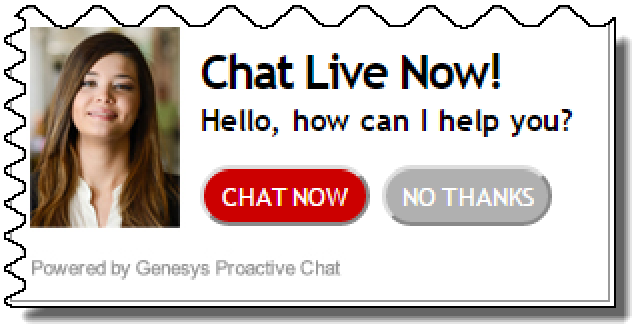
How do I record a consultation?



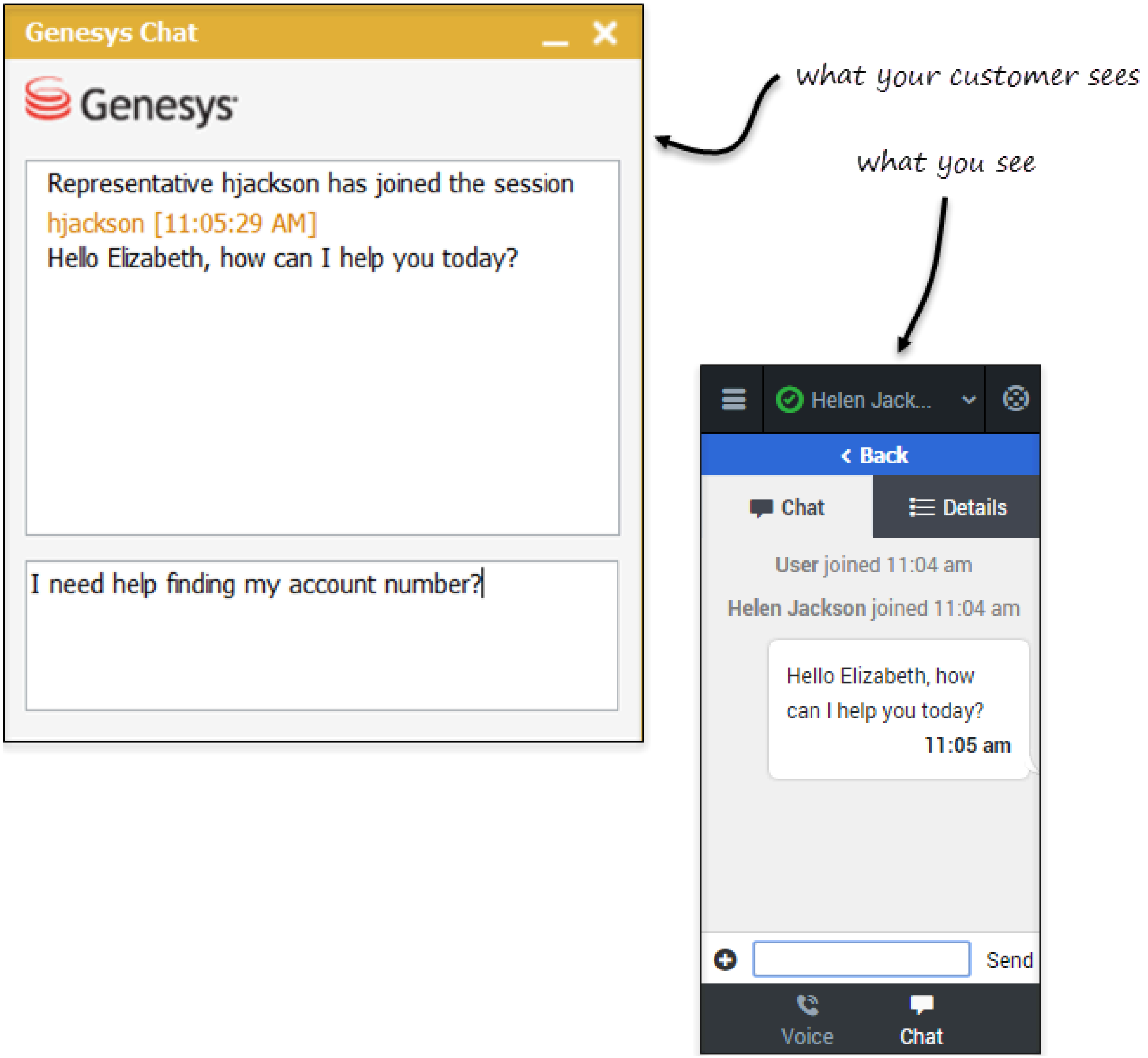
You can also record a consultation. During a voice consultation, look for the controls at the bottom of the Adapter.

Working with the chat channel

As part of the omnichannel customer experience, customers have the opportunity to chat with a live agent while browsing on your website. This proactive touchpoint with the customer enables him or her to reach out to you for assistance, if needed. The invitation that the customer sees might resemble the following pop-up window:



Chat channel overview

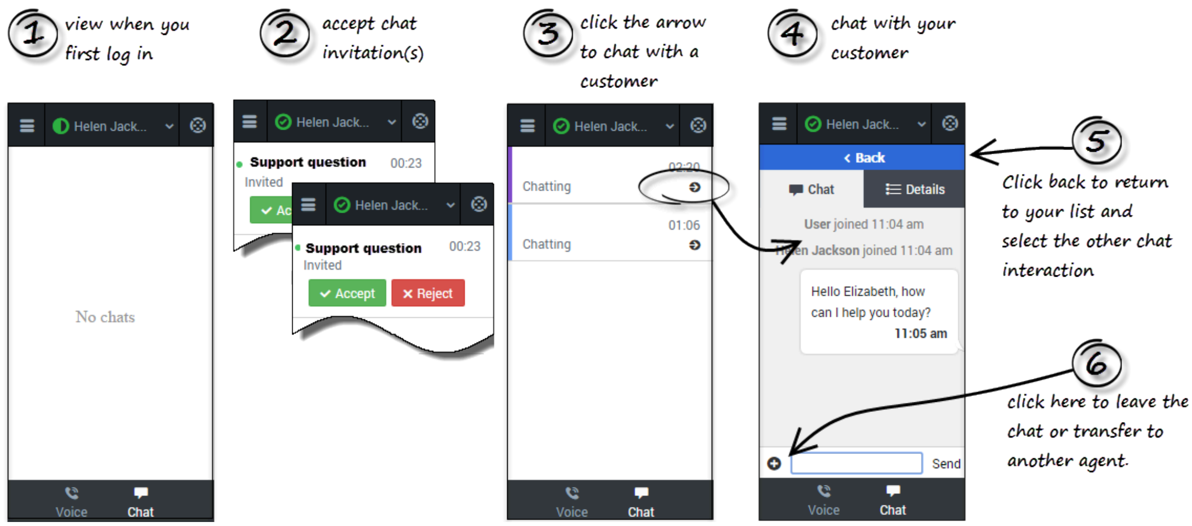


After you log into the Adapter and navigate to the chat channel, you'll see the default view where you can accept or reject a chat.

Using the chat channel, you can:

- Chat with a customer
- Manage multiple chat conversations
- Transfer a chat

When you log into the Adapter and navigate to the chat channel, you'll see the default view where you can accept chat invitations. At first, your chat list will be empty. After you start accepting invitations, your chat list will include all active chats. To access the chat view for an interaction, select the arrow beside the chat list entry. This displays the chat view in which you can send and receive messages. This view has two main areas: chat transcript and chat details. To access other chat interaction son the list, select the **Back** button to return to the list and select another chat.

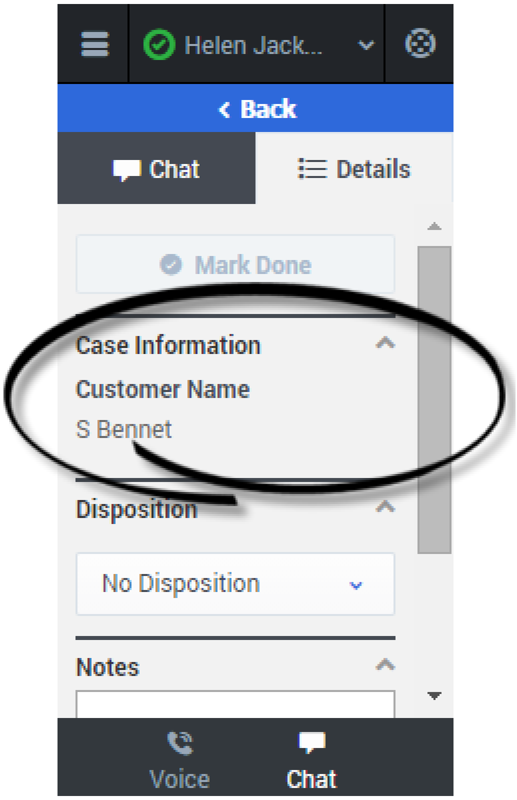


> **Important**
> Regardless of what page you are on in the Chat channel, the **Back** button will always take you back to your list of interactions.

Chat details

The Chat details view shows you all the data the Adapter has about the chat, and it provides fields that you can edit to add more information. After you view the details, you can click the **Chat** tab to return to your conversation or click **Back** to return to the main list of chats.

Case information



The Case Information section shows you read-only information about the chat — the exact information that is displayed is determined by your administrator.

Here are a few examples of some information you might see in your details view:

- Origin
- Target
- Contact name
- Call type
- Account information
- Subject

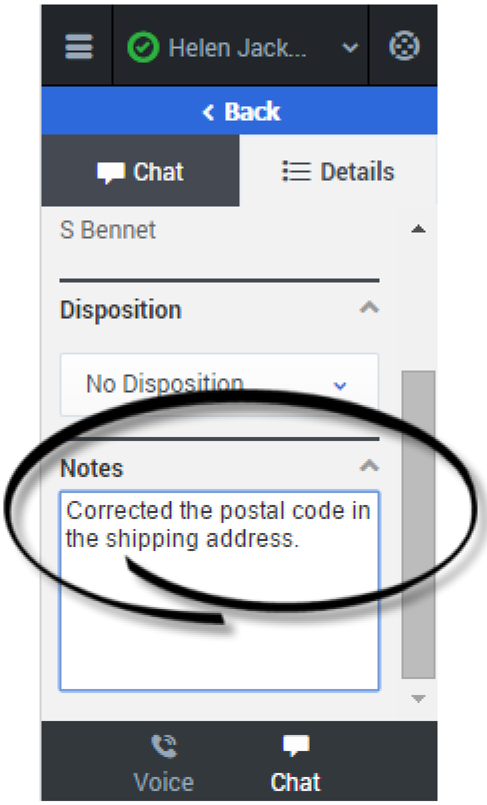
Tip

For chat interactions, the **Call Type** field shows all chats as Inbound.

Depending how your administrator configured your agent, you might be able to add, edit, or delete case information. For more information, see How Do I Edit Case Information?

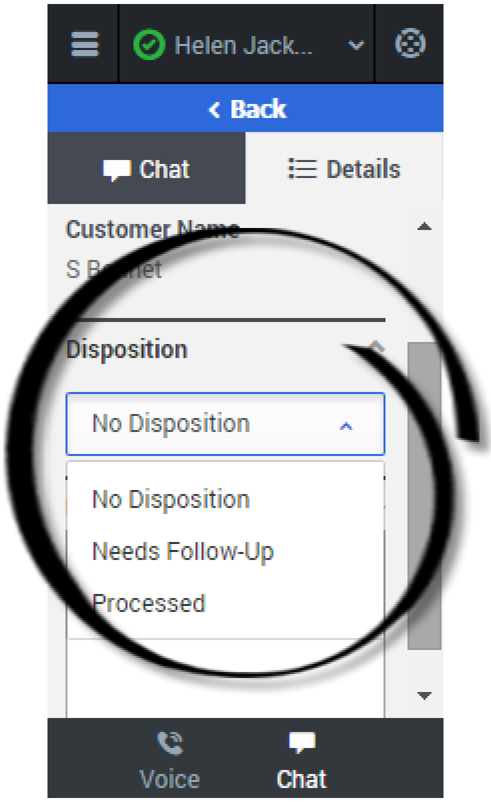
Case information fields might contain a URL that you can click to access more information.

Notes



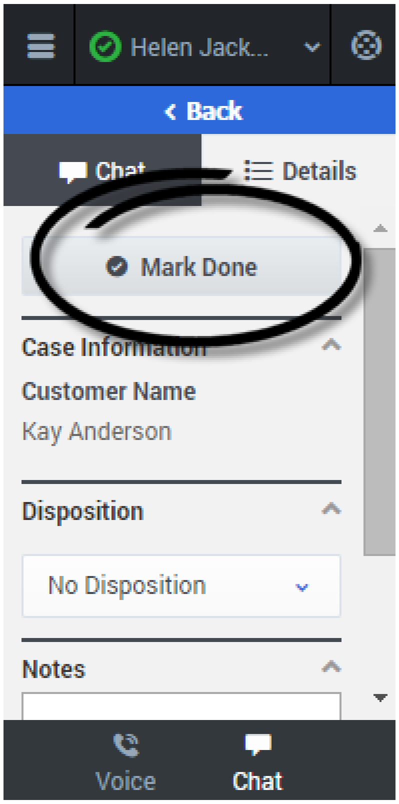
If configured by your administrator, you can add notes either during the chat or as part of your after-call work. To update, just enter your comments in the text field. Ensure that you don't click **Mark Done** first before you add a note. You can't make any further changes after you click **Mark Done**.

Disposition



If configured by your administrator, you can change the disposition for a call either during the chat or as part of your after-call work. You can use this field to record the business outcome of the chat. To update, just click the dropdown list and select a disposition. Ensure that you don't click **Mark Done** first before you select a disposition. You can't make any further changes after you click **Mark Done**.

Finishing a chat



When your chat is over, either because the other party left the chat or you clicked **Leave Chat** , you might need to update some information in the details area (such as Disposition or Notes).

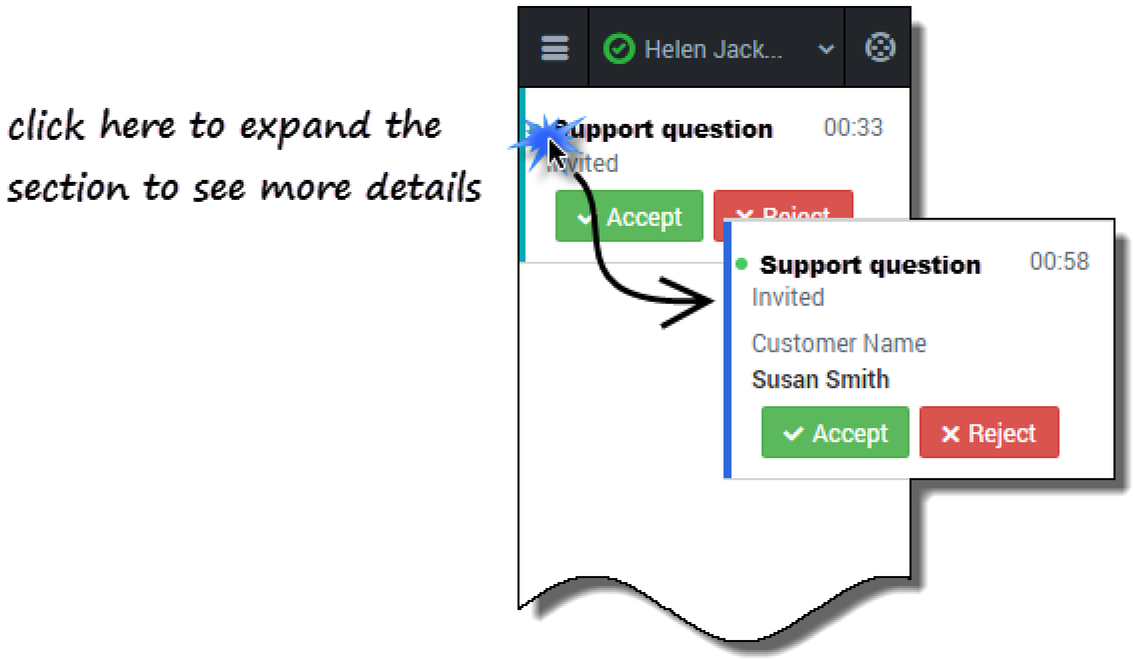
After finishing your after-chat work, you can click **Mark Done**, which completes the chat and sends you back to the main chat channel view. At this time, your status might automatically change to **Ready**, **Not Ready**, or another status, if configured by your administrator; otherwise, you have to change it yourself.

After you mark a chat as done, the chat list is displayed where you can choose another chat to work with.

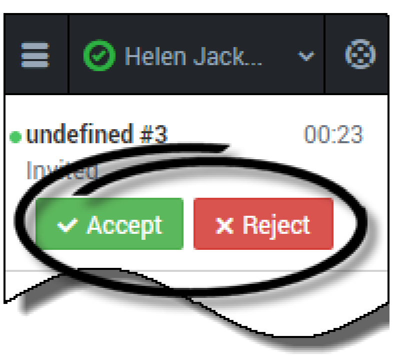
Chatting with a customer

When you open your chat channel, the main chat view is displayed. Initially, there are no chat invitations displayed. When a new chat interaction arrives, it is displayed in your list. A green symbol is displayed beside each unanswered chat invitation. The symbol goes away after you accept the chat and the status changes to show that your chat is in progress. This view is useful for when you are managing multiple chats.

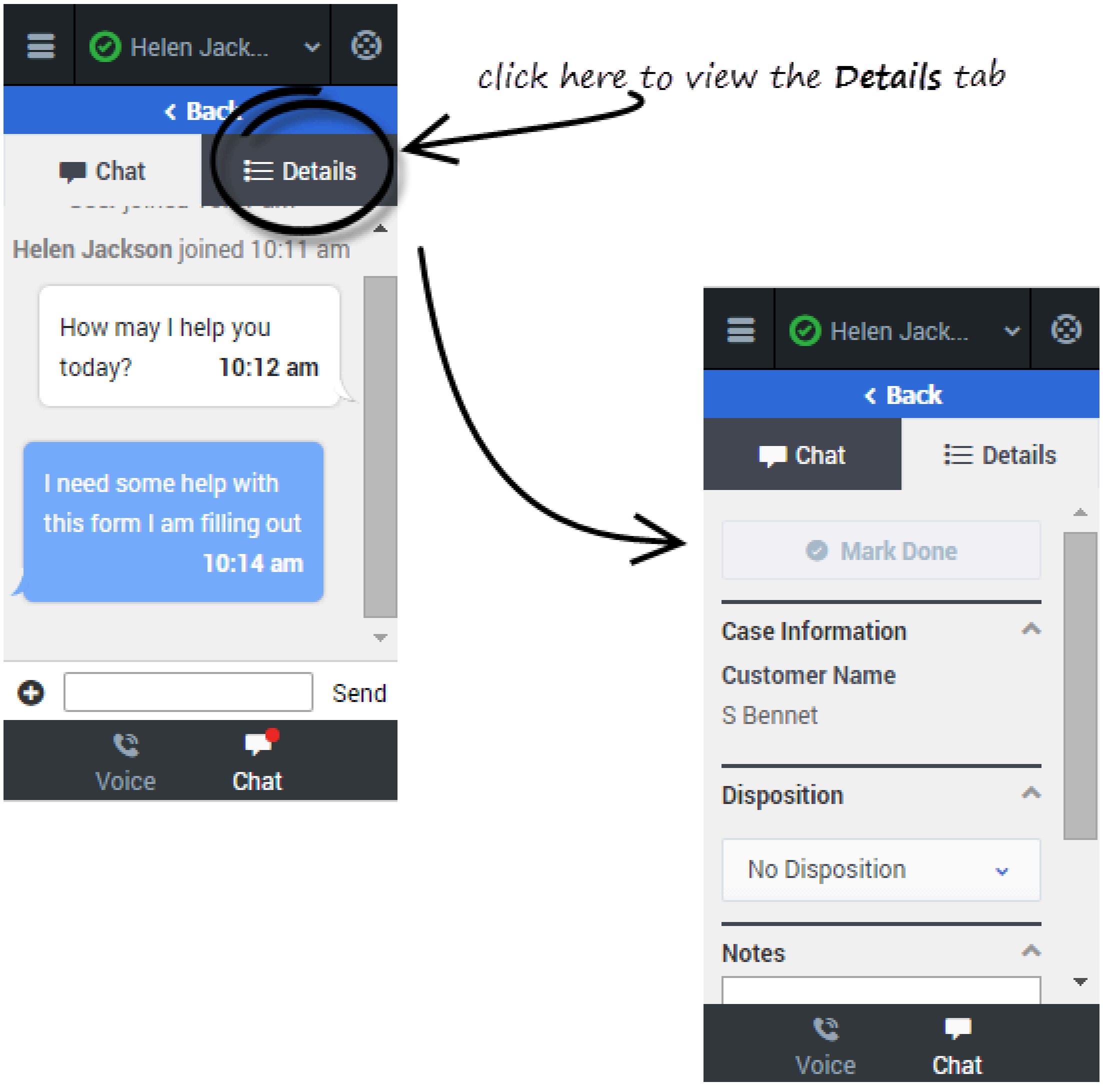
You can click any white space on the invitation to view more details about the chat before you accept or reject it.



You can choose to **Accept** or **Reject** the chat invitation.



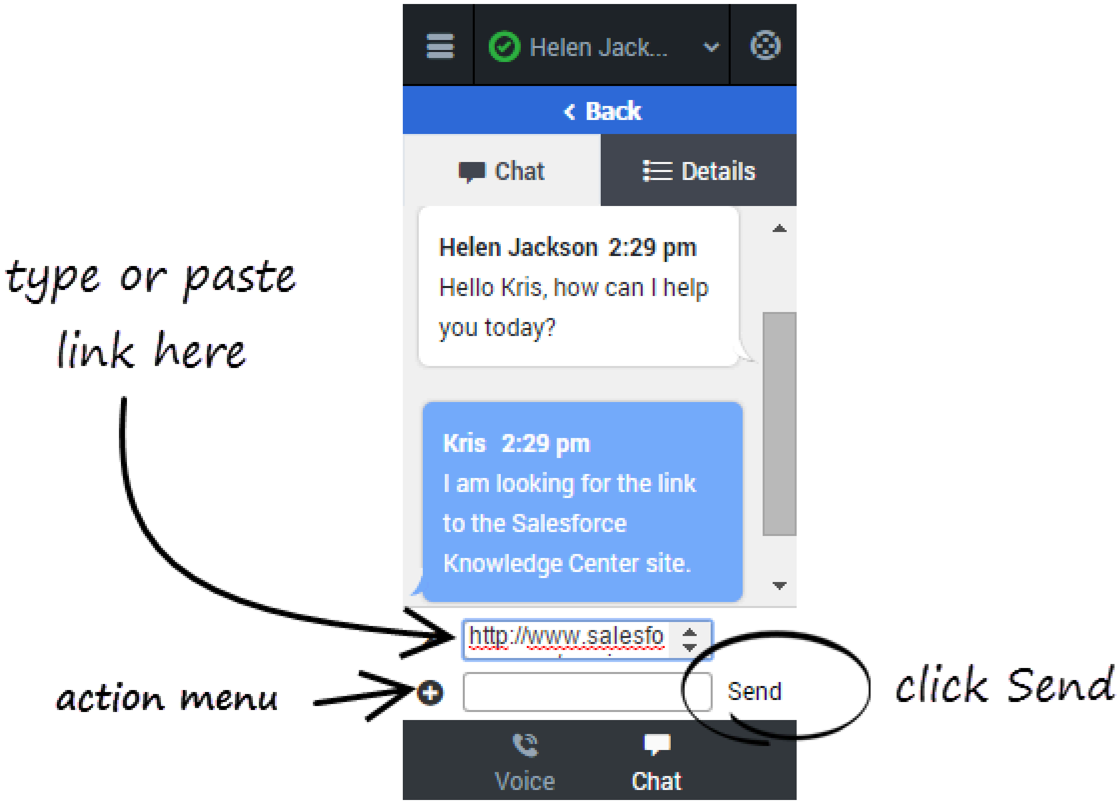
How to conduct a chat



When you accept a chat invitation, the Details view for the chat is opened, you can click the Chat view to chat with your customer. This is where you actively chat with your customer. Chatting is very simple. You just read the messages, and respond by typing text in the text field and then clicking **Send**. You can also click the **Details** tab to view call details.

To conduct a chat, click **Accept** when a new chat invitation arrives. If required, click the **Details** tab to view the call details. Conduct your chat conversation with your customer. When the conversation is complete, click the symbol at the bottom of the Adapter, and then select **Leave Chat**. On the **Detail** tab, enter your notes, select a disposition, and click **Mark Done**.

How to send a link



While chatting with a customer, you might want to send a link to a website. For example, you can send a link to an application form for a client card or a knowledge center on your support site.

To send a link, click **Send Link** in the Actions menu. Copy and paste (or type) the Universal Resource Locator (URL) in the URL field above the entry field that pops up. You can also type a message to accompany the link in the text entry field. Then you click **Send**. The Adapter validates the URL and sends the link to your client.

After you send a URL to a customer, the link stays active in the transcript so that the customer can access the link after the call is complete.

> **Warning**
> If your browser is refreshed or closed while you are in the middle of a chat session, the chat session will resume after you log back into the Adapter. However, if you are typing a message at the time the browser closes or refreshes, your message will be lost. When you close your browser window, you are automatically logged out the Adapter. All interactions are terminated and do not resume when you log back in again; therefore, ensure that your interactions are complete before logging out and closing your browser window.

Important

If you reject the chat, the chat invitation is no longer displayed on the list and the customer is routed to another agent.

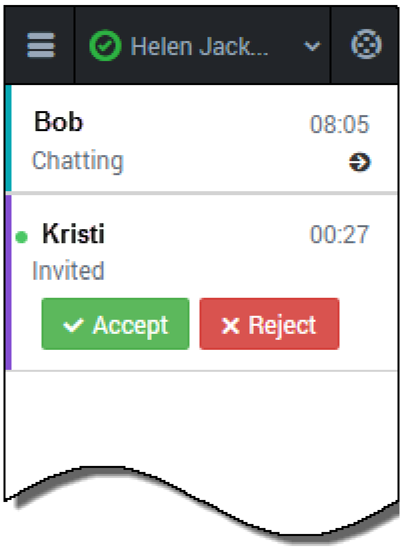
Troubleshooting tip

- If the customer leaves the chat before you accept the invitation, a message is displayed in the chat transcript. This message lets you know that the chat is now offline. The only action that you can perform in an offline chat is mark the chat as done.

Managing multiple chat interactions

The Chat channel features make it easy for you to manage multiple chat interactions. If you have two or more active chat interactions on the go, you can see when you have incoming messages from your other parties and navigate among the chat interactions.

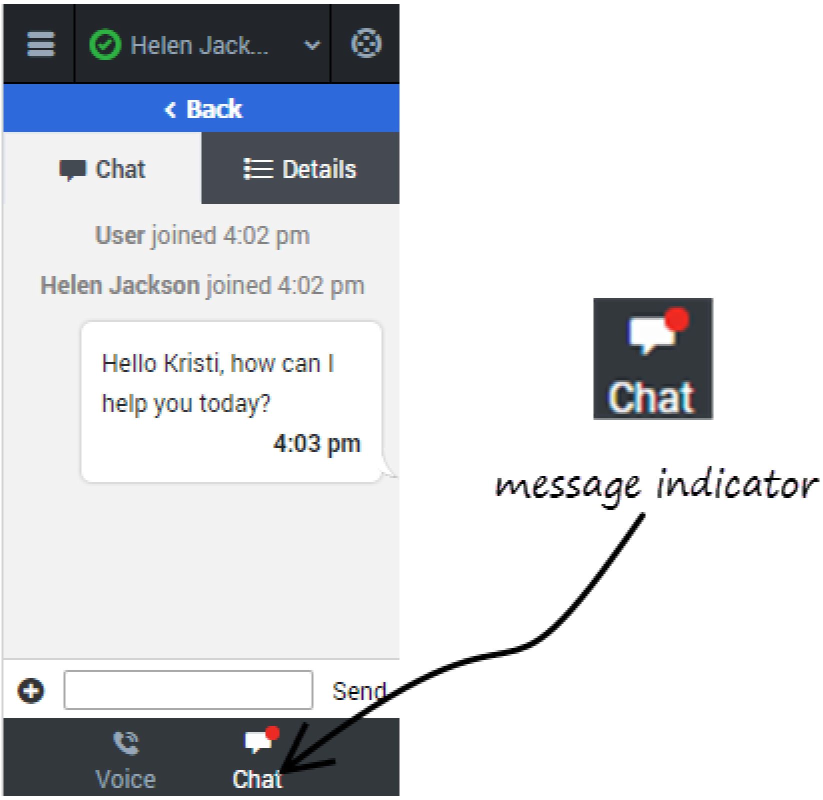
How do I handle two chats at the same time?



Consider this scenario. You are chatting with Bob, a customer who needs your help to complete an online form, when you see a notification on your chat channel icon at the bottom of the Adapter. This notification means that you have a message from another in-progress chat or a pending invitation.

Navigate to the main chat list. Notice that you now have two entries on the list:

- Your chat that already is in progress
- A pending chat invitation from another customer



You can accept the invitation and start the interaction with Kristi. Conversely, if you need to focus on your in-progress chat with Bob, you can click **Reject**. The second chat invitation is routed to the next available agent and the entry is removed from your list.

In this scenario, though, let's accept the chat invitation.

After you greet Kristi and start chatting with her, a new message indicator is displayed on the tab header and a red circle is displayed next to Bob's entry on the chat list. Bob responded to your last message.

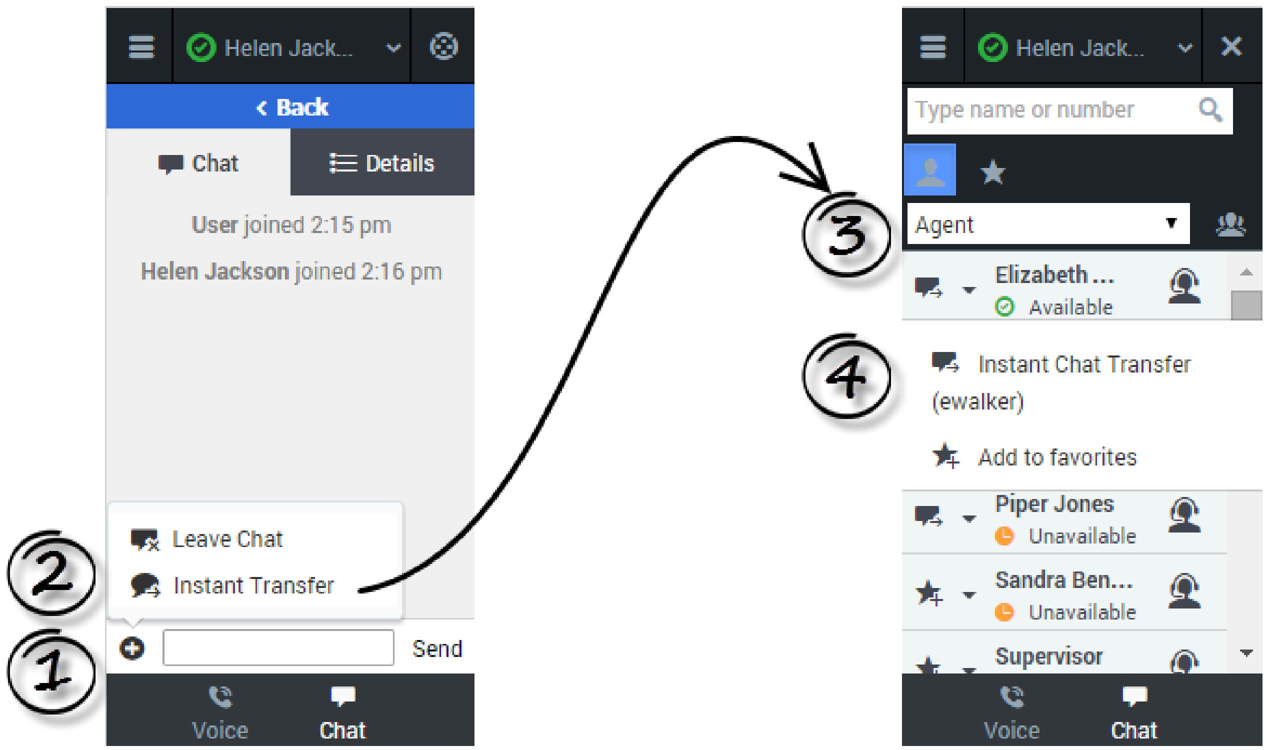
You can click **Back** to return to your chat list, select the arrow next to Bob's chat interaction, and continue chatting with Bob.

In this manner, you can manage several conversations at one time. Remember after each chat is concluded, you must complete the finishing tasks on the **Details** tab and mark the chat as **Done**.

Transferring a chat

When you're on an active chat in Gplus Adapter for Salesforce, you can transfer a chat to another agent. Let's say, for example, that your customer has asked you a question on a topic that you are not trained in.

How do I transfer a chat to another agent?



To transfer a chat, click the plus symbol at the bottom of the **Chat** tab. Click **Instant Transfer**. Choose an agent in the Team Communicator. Click the list box and select **Instant Transfer**.

Video demonstration

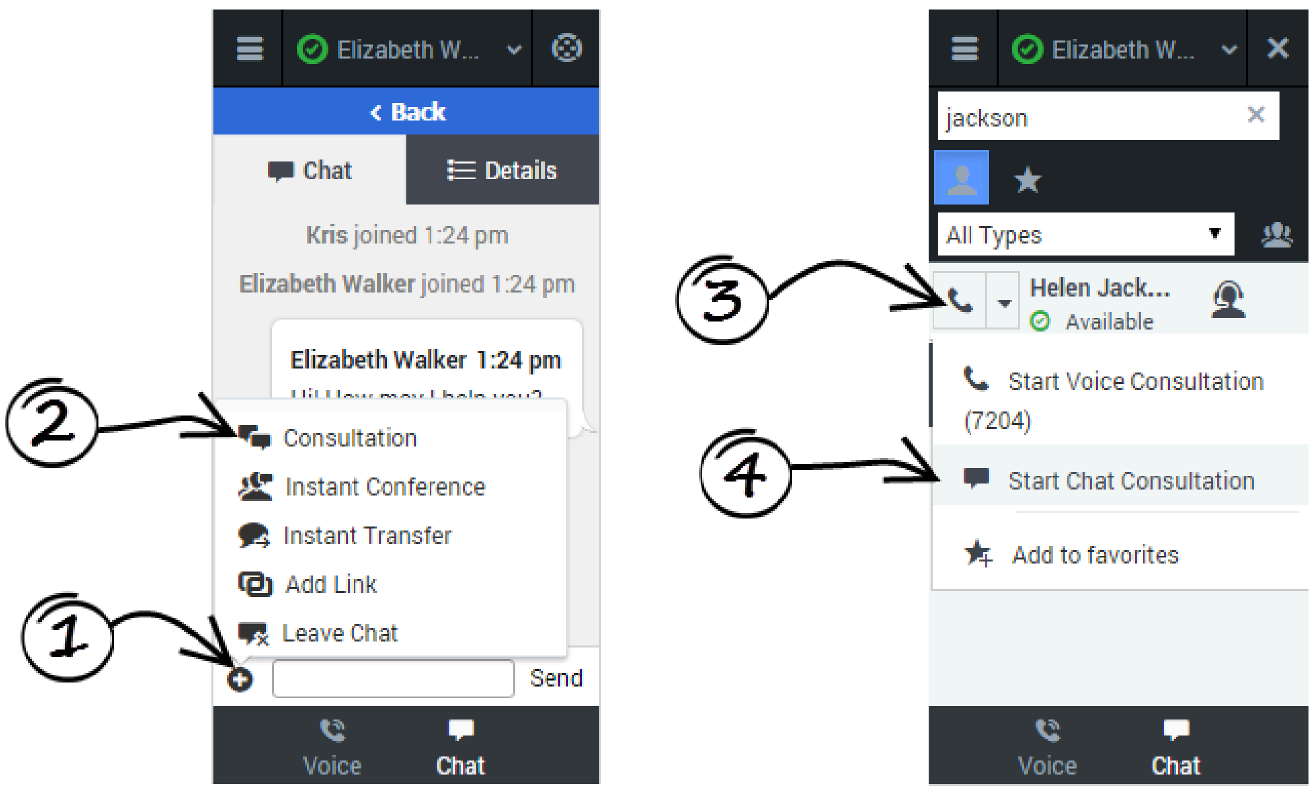
Link to video

If your administrator has configured it, the agent to whom you are transferring the chat might also see related information about the active call in Salesforce. For example, if the caller already exists in the Salesforce contact database, the agent might see the **Edit Contact** screen.

Chat consultations

When you need support while chatting with a customer, you can use the Gplus Adapter for Salesforce to consult with another agent or supervisor. For example, if a customer asks you a question that you don't know or can't find the answer to, you can open a chat consultation with an agent or supervisor that has the knowledge or skill that you need to complete your chat interaction successfully. If necessary, you can easily start a conference chat with you, the customer, and the other agent, or you can transfer the customer directly to the other agent.

Start a consultation



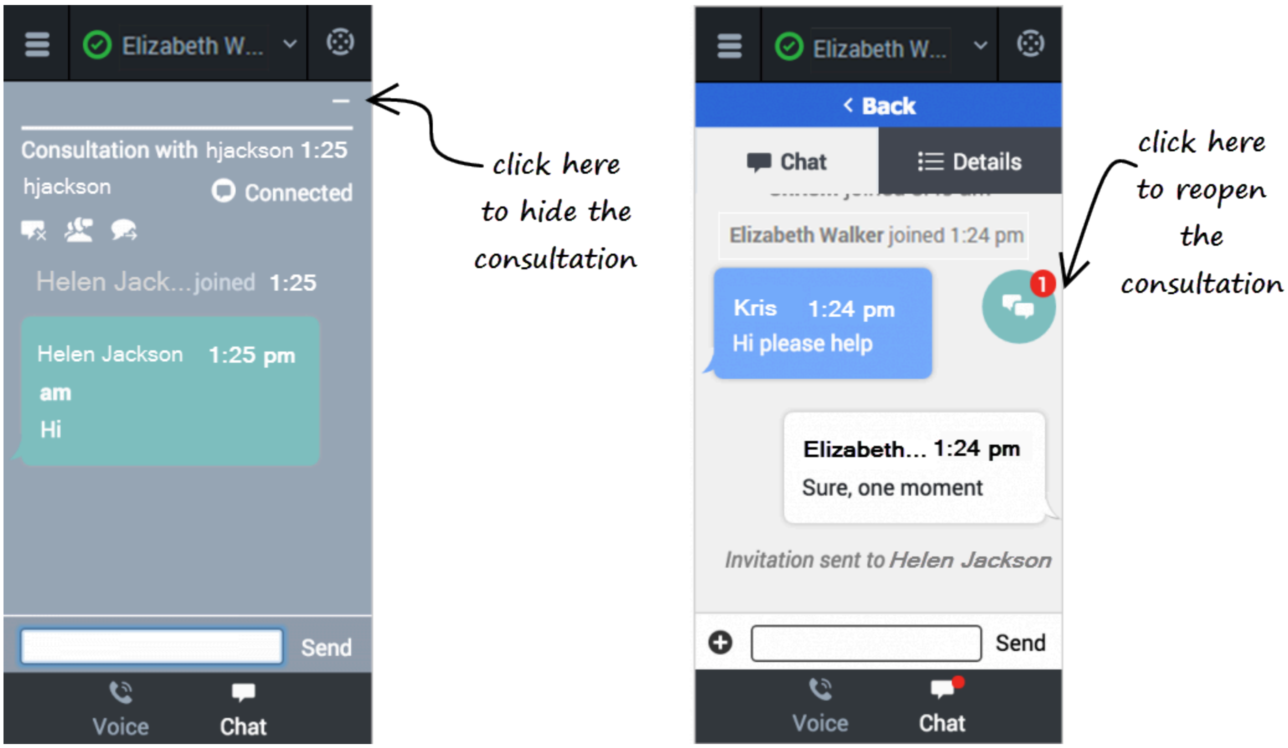
To start a consultation, click **Consultation** on the action menu. After you choose an agent from the Team Communicator and click **Start Chat Consultation**, and the other agent accepts, a collapsible view is displayed over top the current chat view. In this consultation view, you can chat with the other agent. Any text that you type in the consultation view is not visible to your customer.

Let's take a look at the actions that you can take to conclude the chat. You can:

-  —End the consultation, and return to the customer chat.

-  —Complete the chat as a three-way conference. This brings the customer and the agent into the same chat window, allowing for a three-way conversation.
-  —Transfer the chat to the other agent. This concludes your chat with the customer, and the other agent continues.

Managing consultations



You will have chat interactions where you might have several chat views on the go at once. Even in a normal one customer and one agent consultation, you need to manage these multiple screens.

During a consultation, when you need to go back to the customer, click the dash symbol at the top of the view. This collapses the consultation view to a colored bubble. You can place this bubble anywhere on your Adapter by clicking and dragging the bubble. When the consulting agent types a message to you, a notification is displayed on the bubble. For example, if the agent send two messages to you, the number 2 is displayed on the bubble. To return to a consultation, click the chat bubble and the collapsible view is displayed again.

When you have multiple active consultations, each bubble is a different color.

Case information management

In the Gplus Adapter, case information can be modified for voice calls and chat iterations. If you see the pencil icon beside a field or the plus symbol at the top of the **Case Information** section, you have the correct access permissions to update case information. Otherwise, contact your administrator or follow your contact center procedures for updating case information.

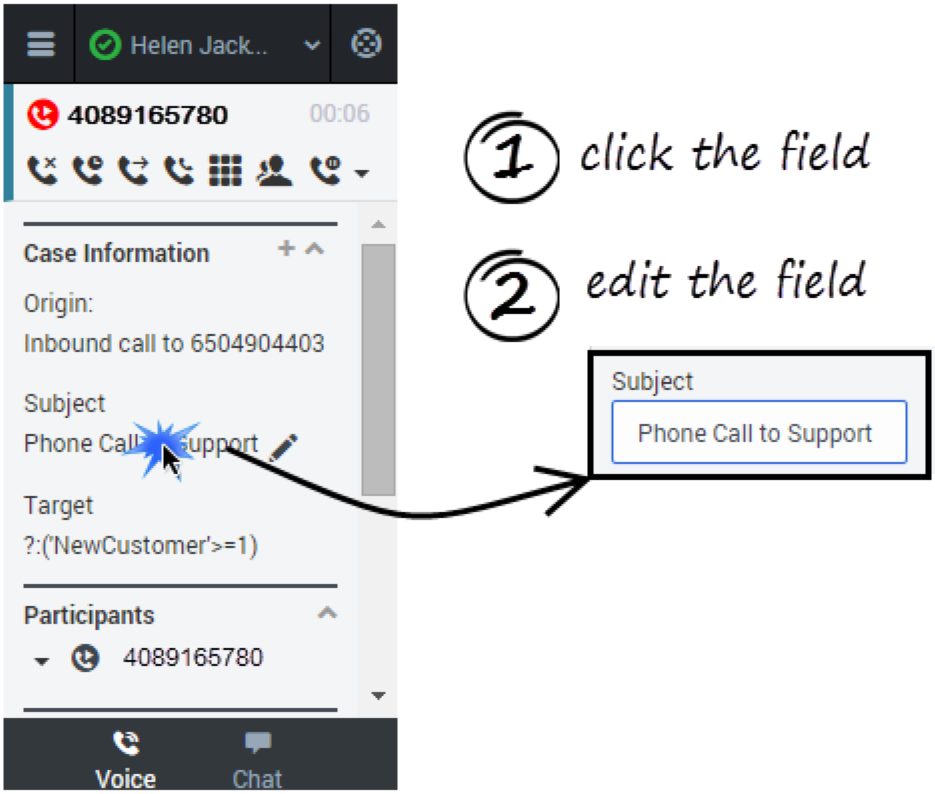
Link to video

Consider this scenario to understand why you would update case information. A customer calls your call center to update details on their account. While talking with your customer you realize that his last name is spelled incorrectly in the contact name field. You can easily correct the spelling error. Many other scenarios could happen such as a complete name change, an update to the reason for calling, or a change in account number.

If you have permission, you can manage the case information in the following ways:

- Edit fields to update the contents of the field.
- Add additional fields to the case information.
- Delete unnecessary fields.

How do I update a Case Information field?

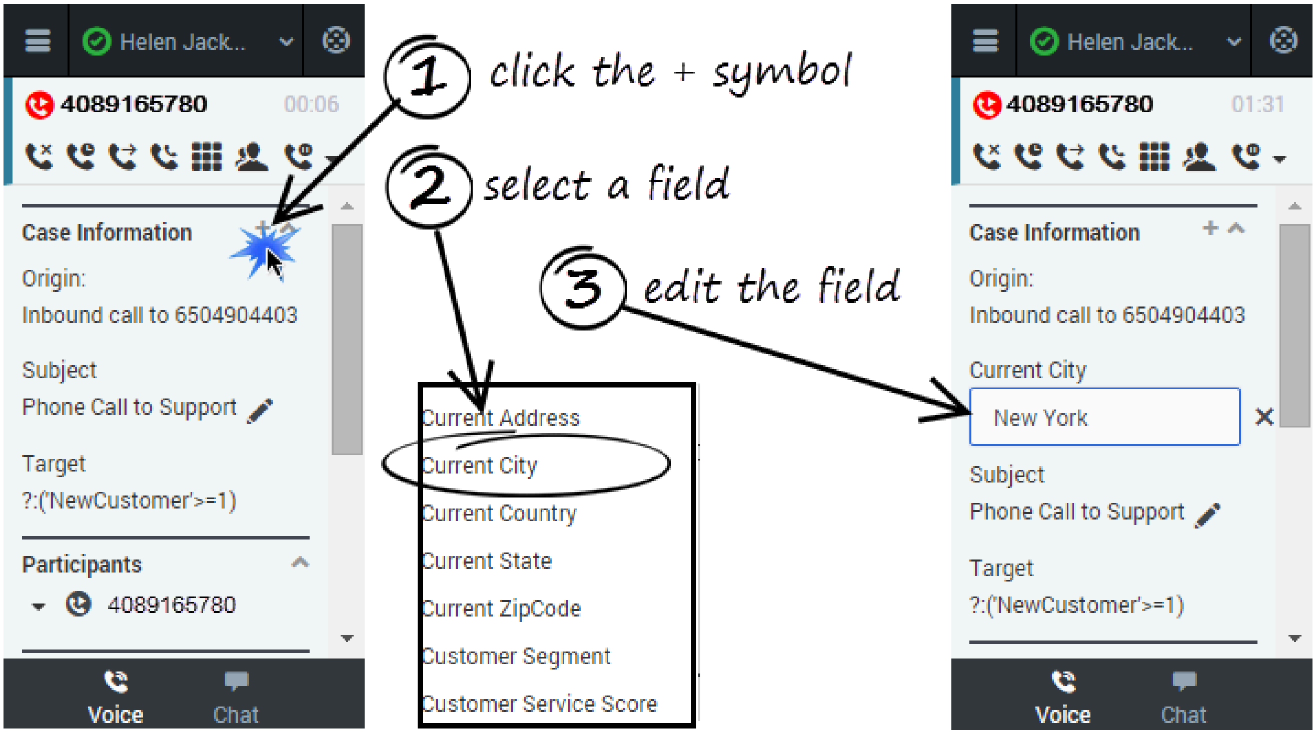


To edit case information, select the field that you want to edit. A text field, a selection drop-down list, or a calendar displays depending on the type of case data.

Each type of field has validation criteria to ensure that you enter the correct information. This prevents you from typing an invalid character or exceeding the maximum number of characters. For example, if you have to enter a credit card number, the field might only allow certain numbers for a particular type of credit card.

If your edit does not match the data validation criteria for the field type, an error icon displays to tell you that you must correct your entry.

How do I add and delete Case Information fields?



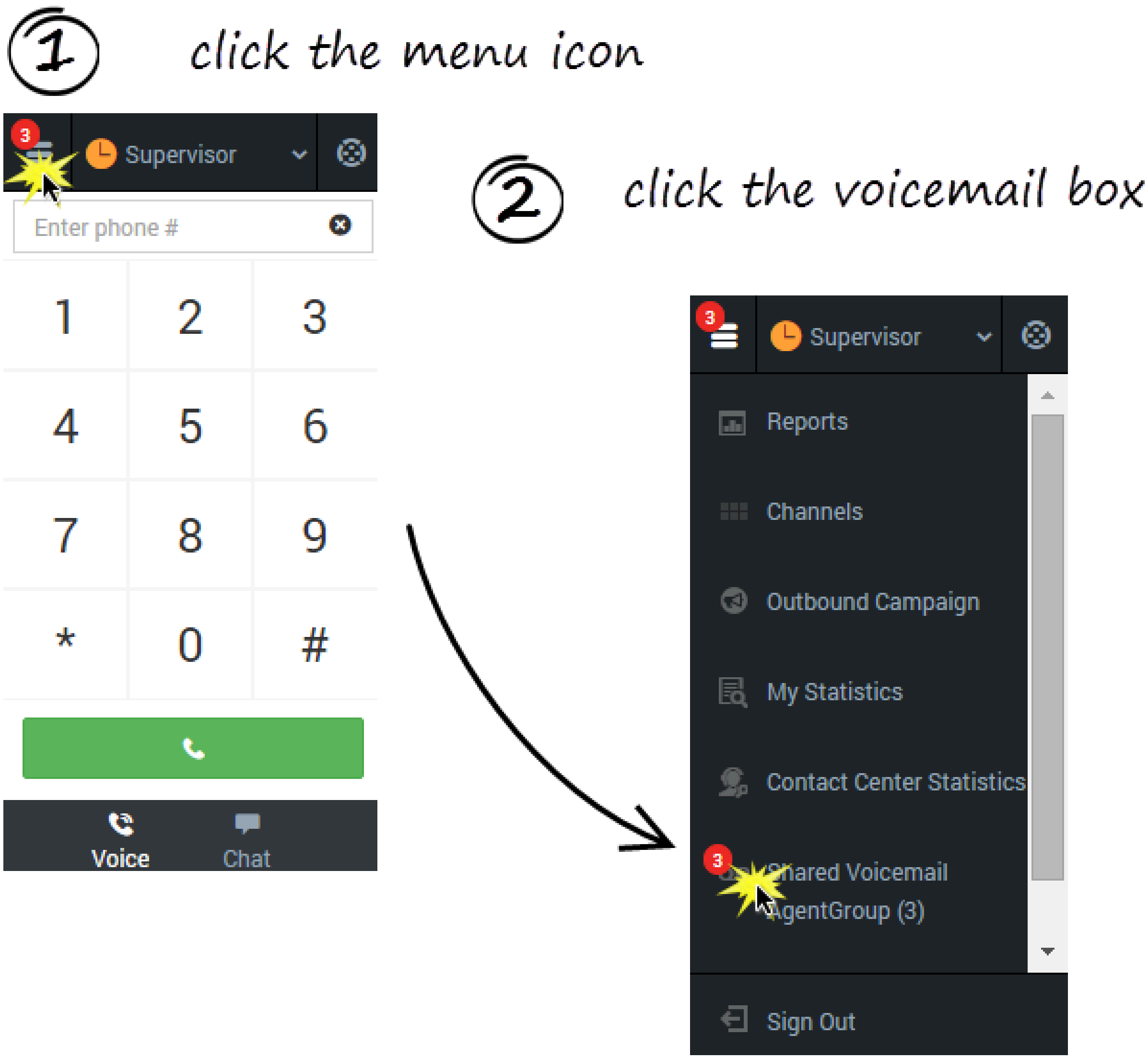
To add a field to the case information, click the plus symbol (+) and select an option from the list that displays. After you add the field, you can edit the case information.

The types of fields you can add depend on what your administrator configured for your contact center. For example, you can an additional field to indicate a preferred language.

To delete a field, click X icon to the right of the field.

Voicemail

How do I check my voicemail?

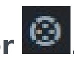


If a red circle with a white number is displayed on the main menu  button, you have voicemail waiting for you. Click the button to view a list of your voicemail boxes.

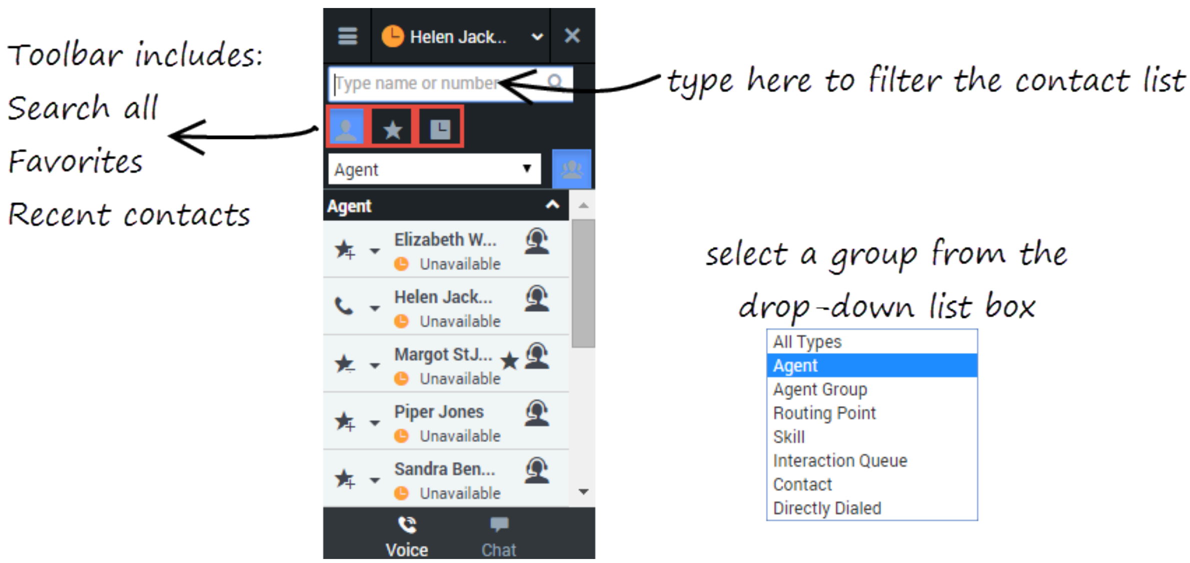
You have a personal voicemail box and possibly a group voicemail box associated with the agent group you belong to. Your mailboxes are only displayed when you have at least one message in the mailbox. When you do have mail, the number of messages in each of your voicemail boxes is displayed beside the name of the voicemail box. Select the voicemail box to open it and listen to your voicemail. The main menu automatically collapses when the voice mail box is selected.

Contact management

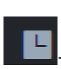
When you need help to resolve a customer issue or you need to transfer the call, use the Team Communicator to locate the contact you need to reach. You can also use the Team Communicator to initiate a call. The contacts in the Team Communicator are already set up for you to use; however, you can add contacts and mark contacts as favorites. After you learn how to navigate the Team Communicator, you should be able to locate your contacts quickly and reduce the amount of call time you use to search for contact.

To open the Team Communicator, click **Team Communicator** .

Find a contact



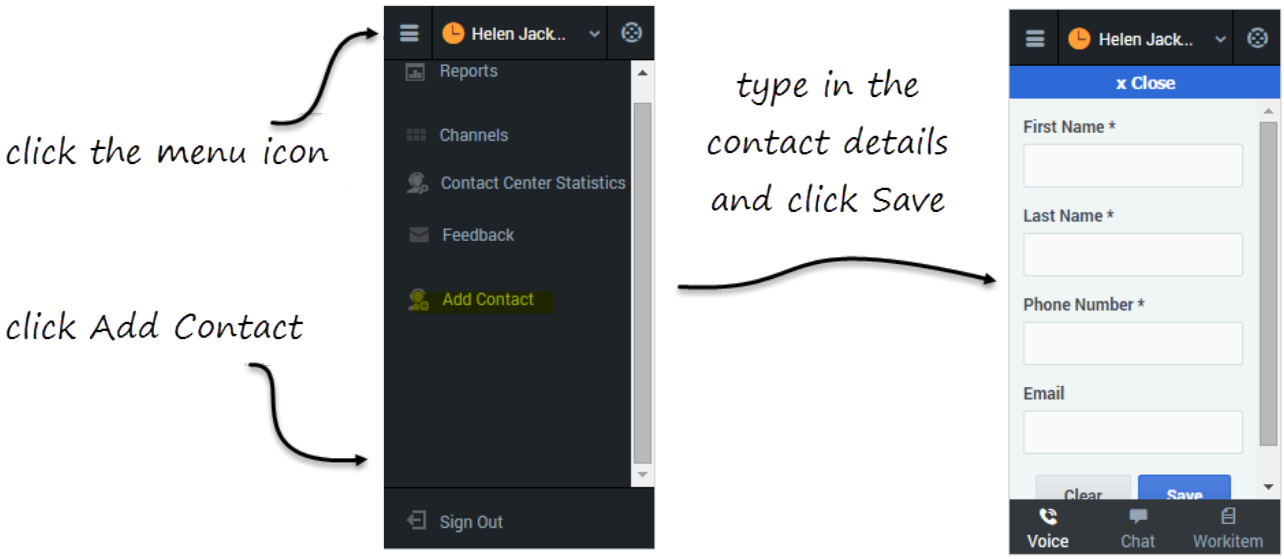
The Team Communicator provides several ways to find a contact.

- Type a name or number in the text field to filter the contact list. The contact list filters the list for you as you type, even if you only type part of a name. For example, if you want to locate the contact for Sandra, you can type San and the list shows all contacts with San in the name.
- The toolbar enables you to:
    - —List all contact types
    - —List your personal and corporate favorite
    - —List recent contacts

- The drop-down list box enables you to display categories of contacts, such as agent groups, routing points, skills, and other such groupings.

Favorite contacts have a star  next to the contact name. Corporate favorites are contacts that marked as favorite by an administrator for use with all agents in your agent group or contact center.

Adding a new contact



Sometimes, you might need to add contacts to your contact list. For example, you can add an external contact.

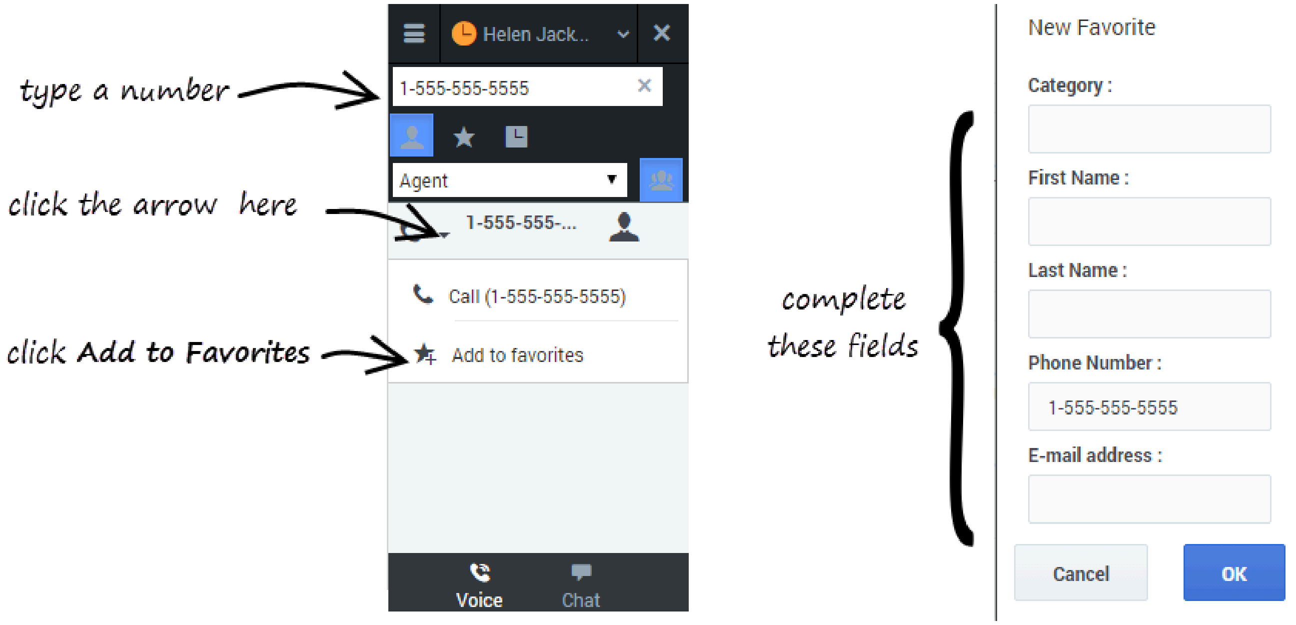
Open the **Add Contact** panel from the main menu and fill out all mandatory fields and the email address. After you click **Save**, a confirmation message is displayed.

Tip

Ensure that you give your contact a unique name. If you have two more entries with the same name, it will be difficult for you to pick which one to call. If you have more than one contact name with the same name, consider appending the last name. For example: John Smith (cell) and John Smith (office).

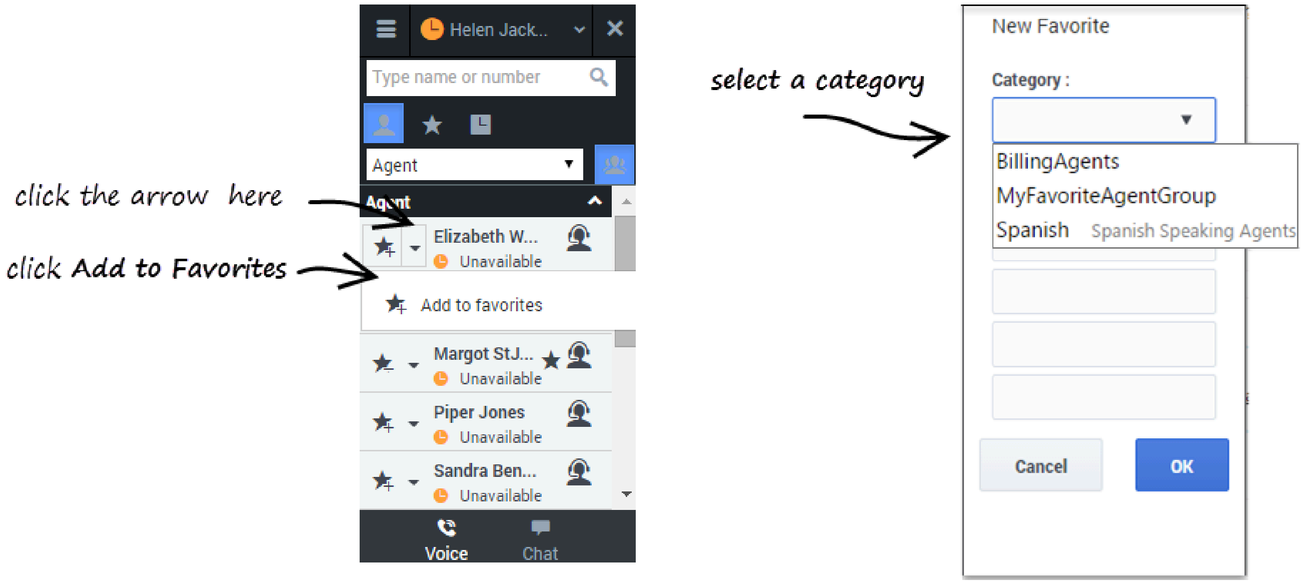
You can further verify that the contact was saved by opening the Team Communicator and typing your new contact's name in the search bar. The contact should appear in the list of results.

Add a new contact as a favorite



When you type a phone number in the Adapter, the Team Communicator recognizes whether the number is already in your contact list or not. If the typed number isn't already a contact, a new entry is added to the contact list. Click the drop-down menu next to the number and select **Add to Favorites**.

Mark an existing contact as a favorite



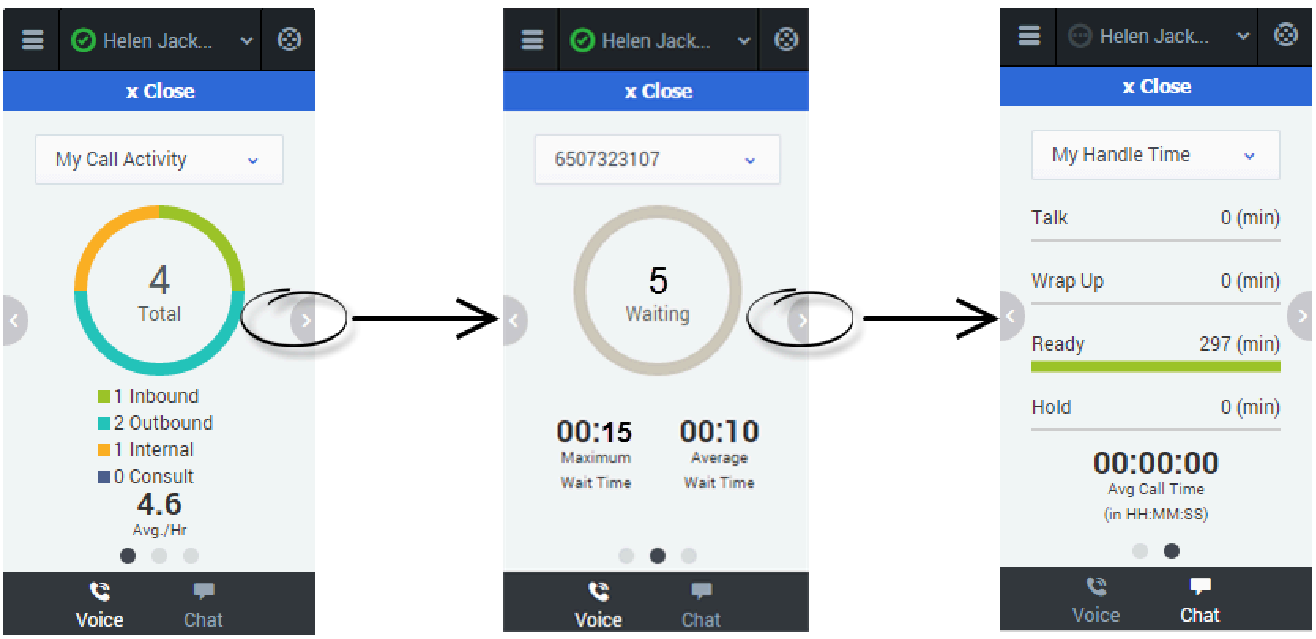
If you find yourself calling the same contact frequently, you can add the contact to your favorites list. Select the contact that you want to mark as a favorite, click the drop-down menu next to the number, and select **Add to Favorites**.

Viewing your reports

While you are working in the Gplus Adapter for Salesforce, you can view reports and statistics at any time. This information is important for you to see so that you can gauge the call wait times and monitor your Key Performance Indicators (KPIs).

Reports and statistics are available to you through the main menu. You can access the following Adapter views:

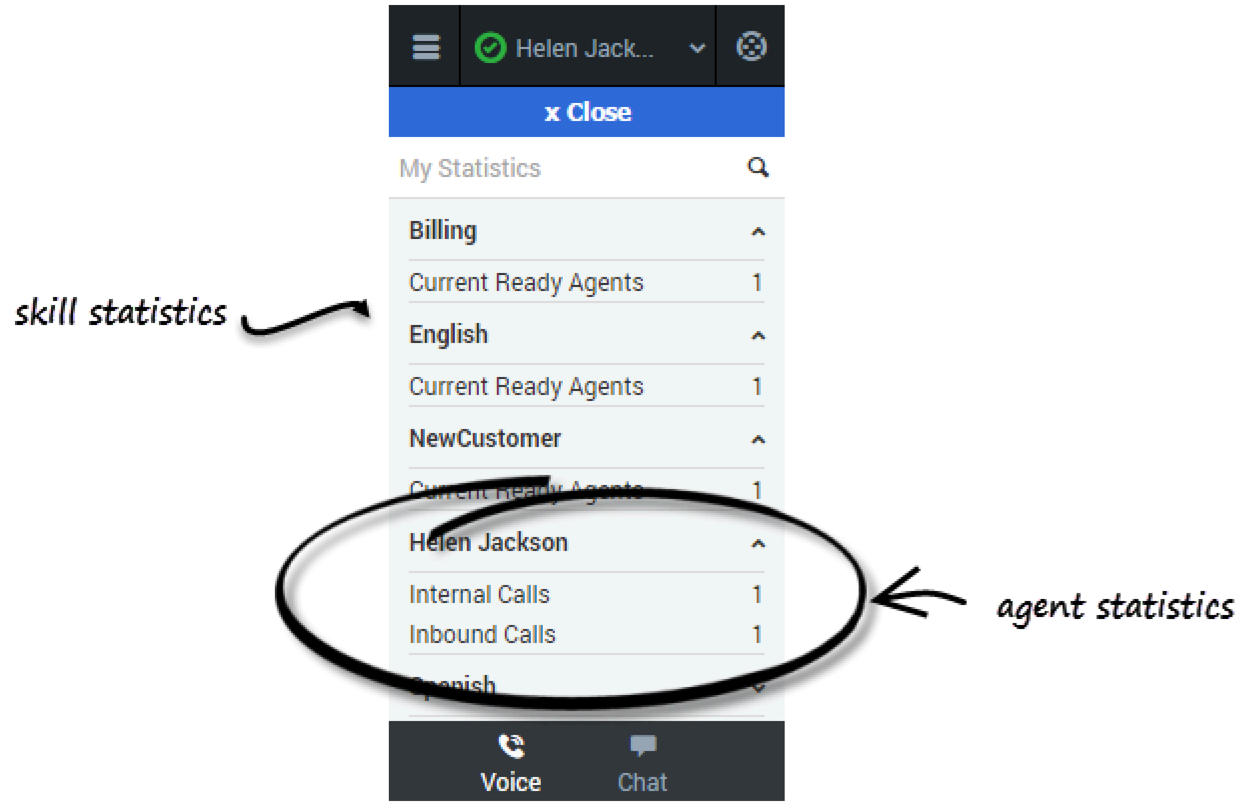
Reports view



The Reports view for voice interactions displays two pages: **My Call Activity** and **My Handle Time**. To navigate between the pages, use the arrows on the left and right side of the Adapter.

- On the **My Call Activity** page, you can view a diagram that represents the averages of calls per hour and call time. Call Activity metrics include Total calls, Inbound calls, Outbound calls, Internal calls, and Consult calls.
- On the queue statistics page, you can select a queue from the drop-down list and see corresponding statistics such as the number of calls waiting, the maximum wait time, and the average wait time.
- On the **My Handle Time** page, you see metrics (in minutes) for Total time, Talk time, Wrap Up time, Ready time, and Hold time.

My statistics view



The **My Statistics** page of the Adapter displays the list of your statistics, otherwise known as Key Performance Indicators (KPIs).

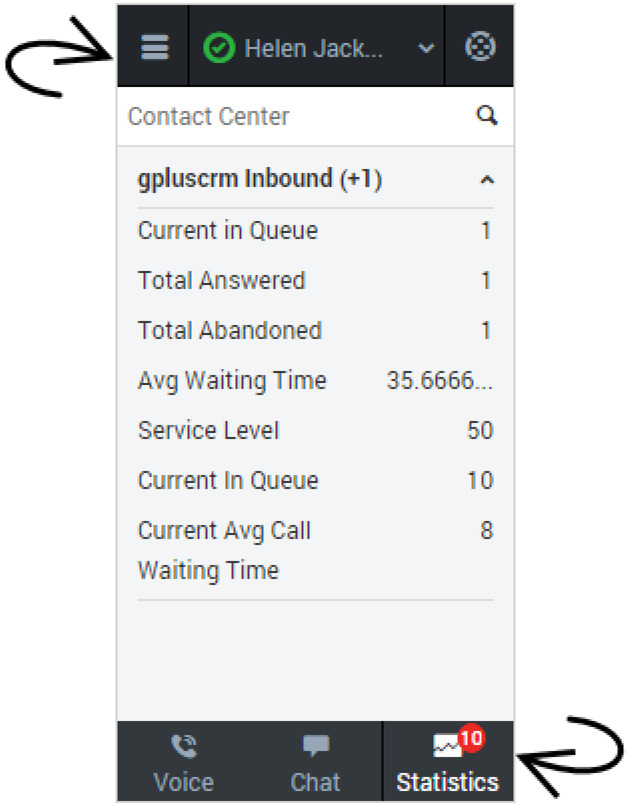
You can access the My Statistics page from the main menu at the top corner of the Adapter. The statistics that you see depend on how your administrator has configured your account. For example, you might see agent statistics, skill statistics, and queue statistics. If your Adapter does not include a My Statistics option on the main menu, your administrator might not have added any statistics to your agent account. In this case, contact your administrator.

You can expand sections by clicking the arrows next to the section title.

You can also type a value into the search field to filter the list of statistics that are displayed.

Note: Statistics about the Routing Points, Queues, and so on, are displayed in the Contact Center Statistics tab.

Contact center statistics view



The **Contact Center** page on the Adapter displays a summary of your Routing Point metrics, which might include:

- Average Waiting Time
- Waiting Calls
- Max Wait Time
- Service Level
- Abandoned
- Answered

Your Adapter might display more, or fewer, metrics depending on how your administrator has configured the Contact Center Statistics view.

You can also type a value into the search field to filter the list of statistics that are displayed.

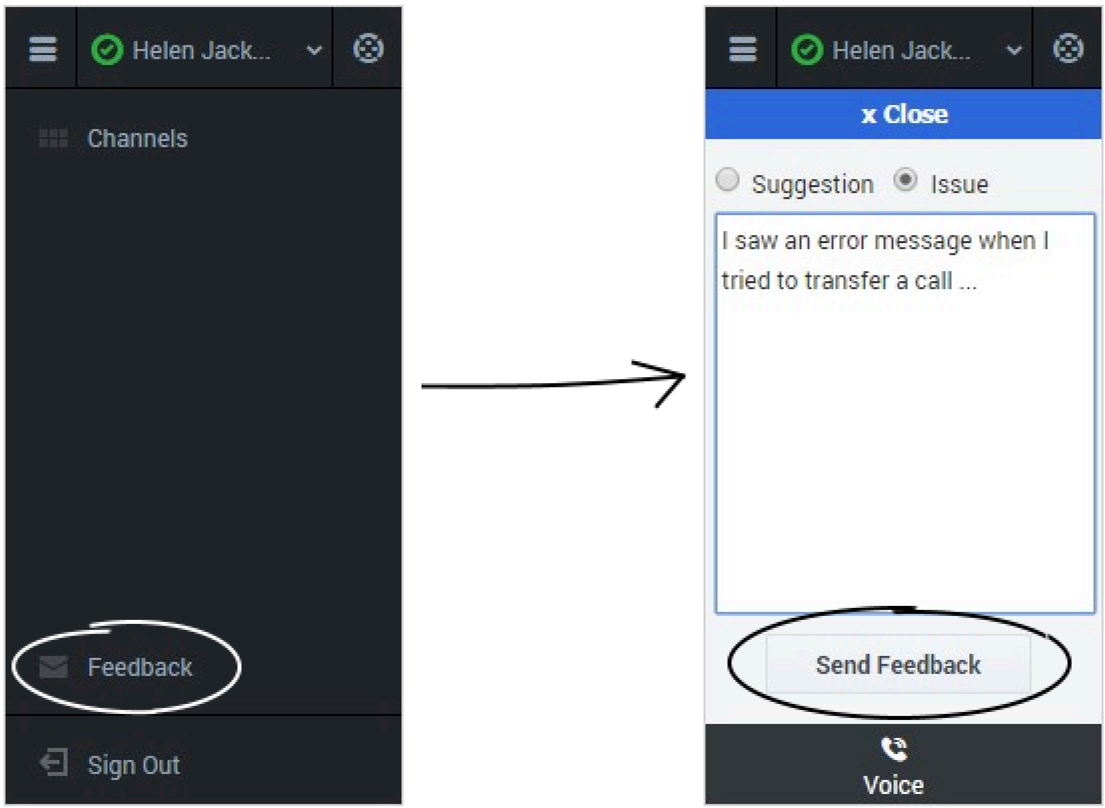
You can access these statistics from the main menu. You may also be able to view these statistics by clicking **Statistics** from the bar at the bottom, if your administrator has configured this option.

The number on the **Statistics** icon might display the value of a statistic configured by your administrator. You can identify the statistic name by hovering or placing the mouse over the **Statistics** icon.

Submitting feedback

Sometimes web-based applications don't work as expected. There might be network connection issues, or the system that sends you phone calls and chats might be slow or behaving in odd ways. Sometimes the sound quality of a phone call is bad. Sometimes an error message is displayed on your desktop. These and other issues are problems that you should report to your supervisor.

How to provide feedback when something goes wrong



Open the **Help** menu and select **Feedback** to open the **Feedback** window. Choose the type of feedback that you want to give, either a suggestion or to report an issue, describe the problem or suggestion by typing in the text box, then click **Send** to submit your feedback. This information, along with logs about what you were doing in your most recent Agent Desktop session, are sent to Genesys and are available to Customer Care for later reference.

If for some reason the Adapter becomes disconnected from your network and you have to close your browser and launch a new one to log in again, the Adapter automatically opens the **Feedback** window to let you write a report about the disconnection problem immediately.

Once a feedback report is logged to you as a supervisor, contact Genesys Customer Care as soon as possible to provide the reporting user's name and DN at the time of the incident, as well as the approximate time the incident occurred. The Customer Care agent should be able to retrieve the relevant log to determine what the issue might have been.

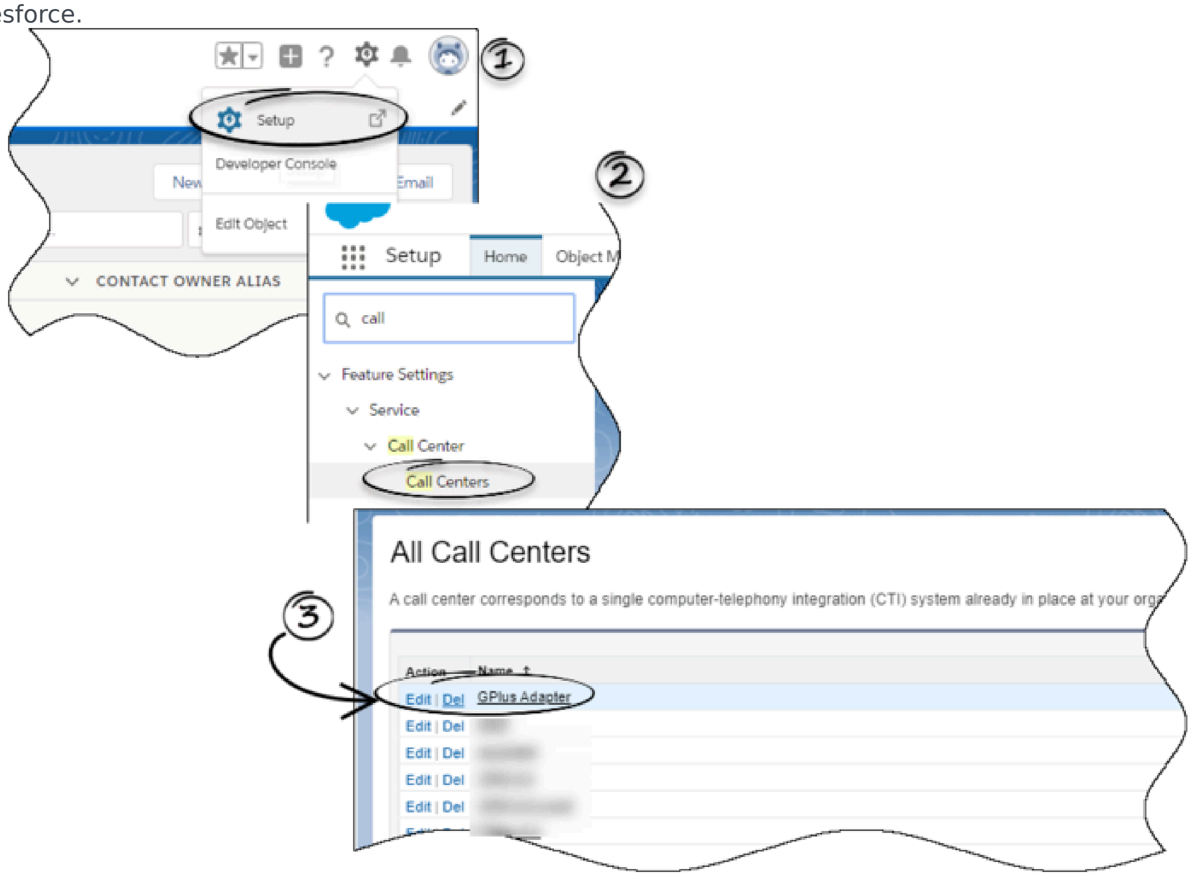
Migrating Gplus Adapter for Salesforce to Gplus Adapter for Salesforce - WWE option

This article takes you through the steps to remove **Gplus Adapter for Salesforce** (a stripped down version of WWE) and install **Gplus Adapter for Salesforce - Workspace Web Edition (WWE) option** (a full-fledged version of WWE).

Removing Gplus Adapter for Salesforce

Follow these steps to remove Gplus Adapter for Salesforce:

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, find the Call Center you configured for Gplus Adapter for Salesforce.



4. Click **Delete**.

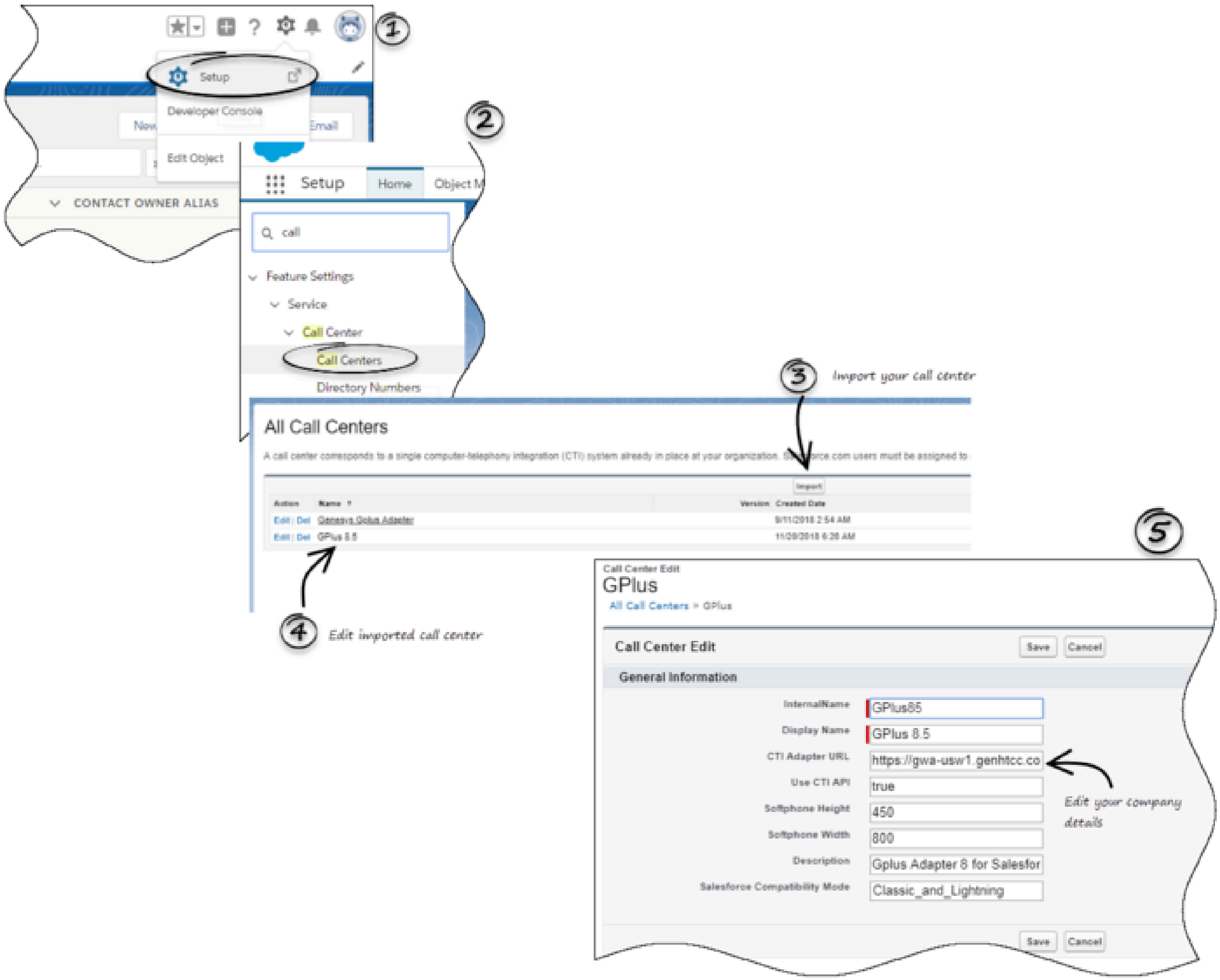
Creating a Gplus Adapter URL

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 - Workspace Web Edition(WWE)

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, Gplus85.
5. 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.

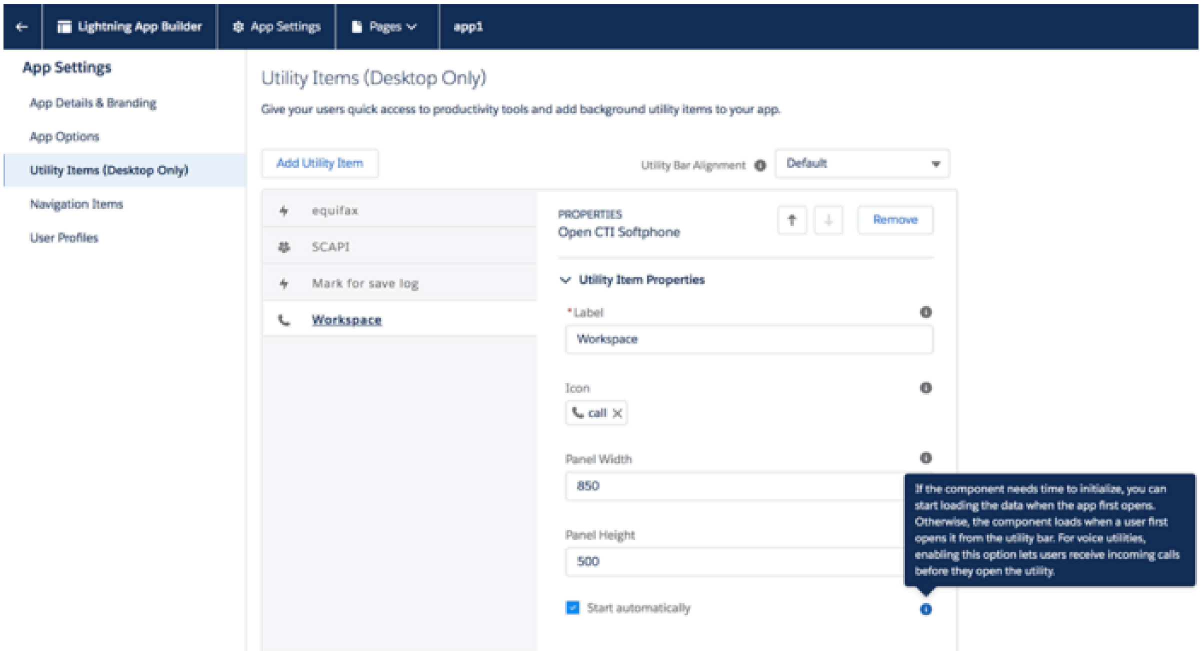
Adding users to Call Center

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. Search the interface to find the users you want to add to Gplus Adapter for Salesforce - Workspace Web Edition (WWE).
4. Select the users you want to add and click **Add to Call Center**.

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 - Workspace Web Edition (WWE).
    - In the **App Options** step, ensure that you select **Console Navigation**. Gplus Adapter for Salesforce - Workspace Web Edition(WWE) 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 - Workspace Web Edition (WWE) is not initialized immediately, then agents do not receive voice calls until they first open the application.

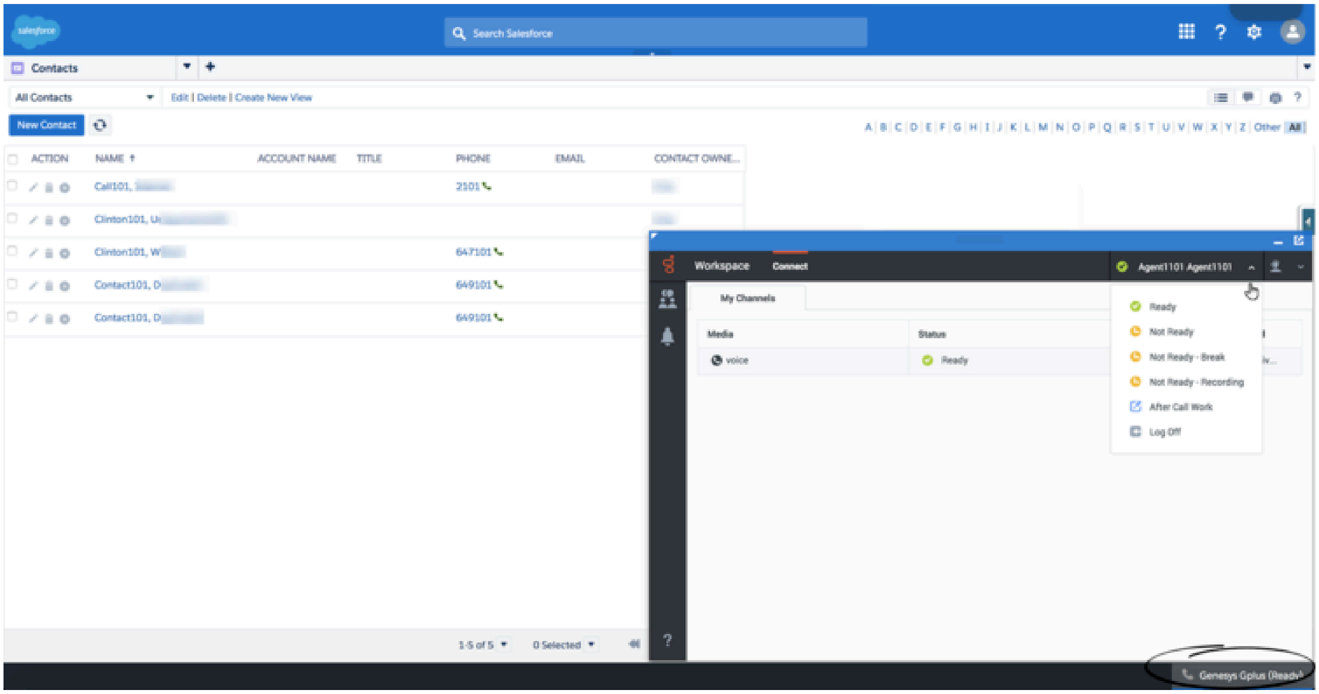


4. Specify **Navigation Items** and **User Profiles** for the new Lightning app by referring to Salesforce documentation.
5. Save the application.

Accessing Gplus Adapter for Salesforce - WWE Option

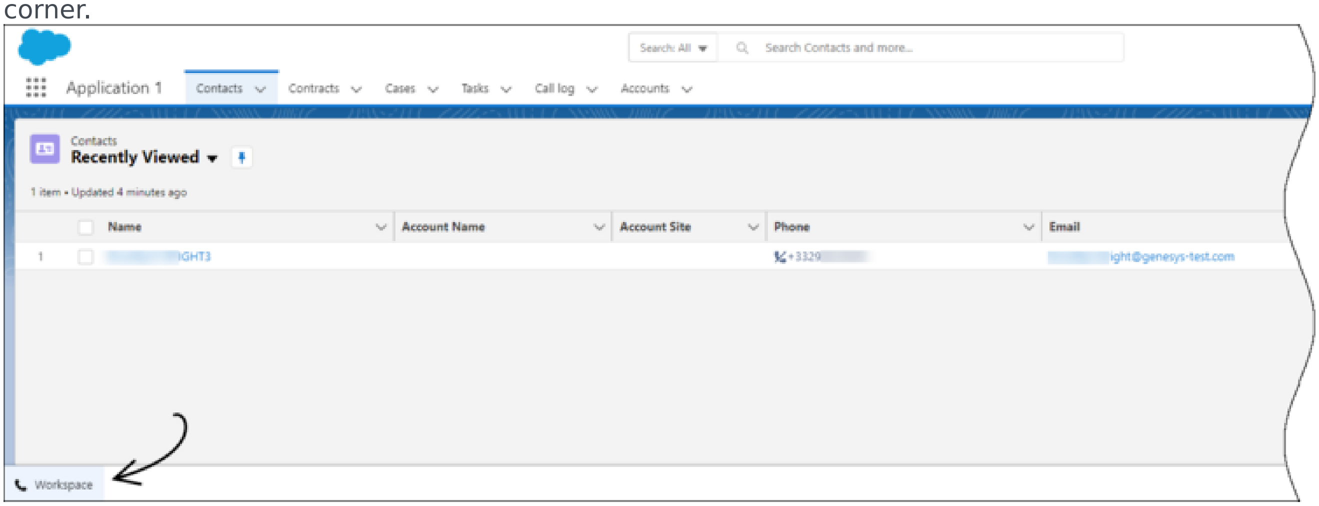
Classic Mode

You can access Gplus Adapter in Salesforce Console by clicking the phone icon in the bottom-right corner.



Lightning Mode

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



Gplus Adapter for Salesforce - WWE option

The Agent Desktop, when deployed as an embedded application in Salesforce Console, is an interaction management console that provides you with a robust subset of features that are available in the full Workspace Web Edition (WWE) agent desktop. This product adds more functionality to your softphone and seamlessly integrates the adapter activity in your sales or service console.

How do I access the Agent Desktop console?

Link to video

If the Agent Desktop console is configured in your sales or service console, you will see a **Workspace** icon at the bottom right corner of your screen. Depending on how your console is configured, the **Workspace** 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.

After you open the Agent Desktop console, you can click anywhere in the title bar along the top of the console to drag it to a new position within your browser window. You can also undock the Agent Desktop console by clicking the arrow at the top right of the window. This opens the console in a new browser window that you can resize and drag to a new location. If you want to redock the console, just click the arrow again and the console returns to the standard location.

Related Documentation

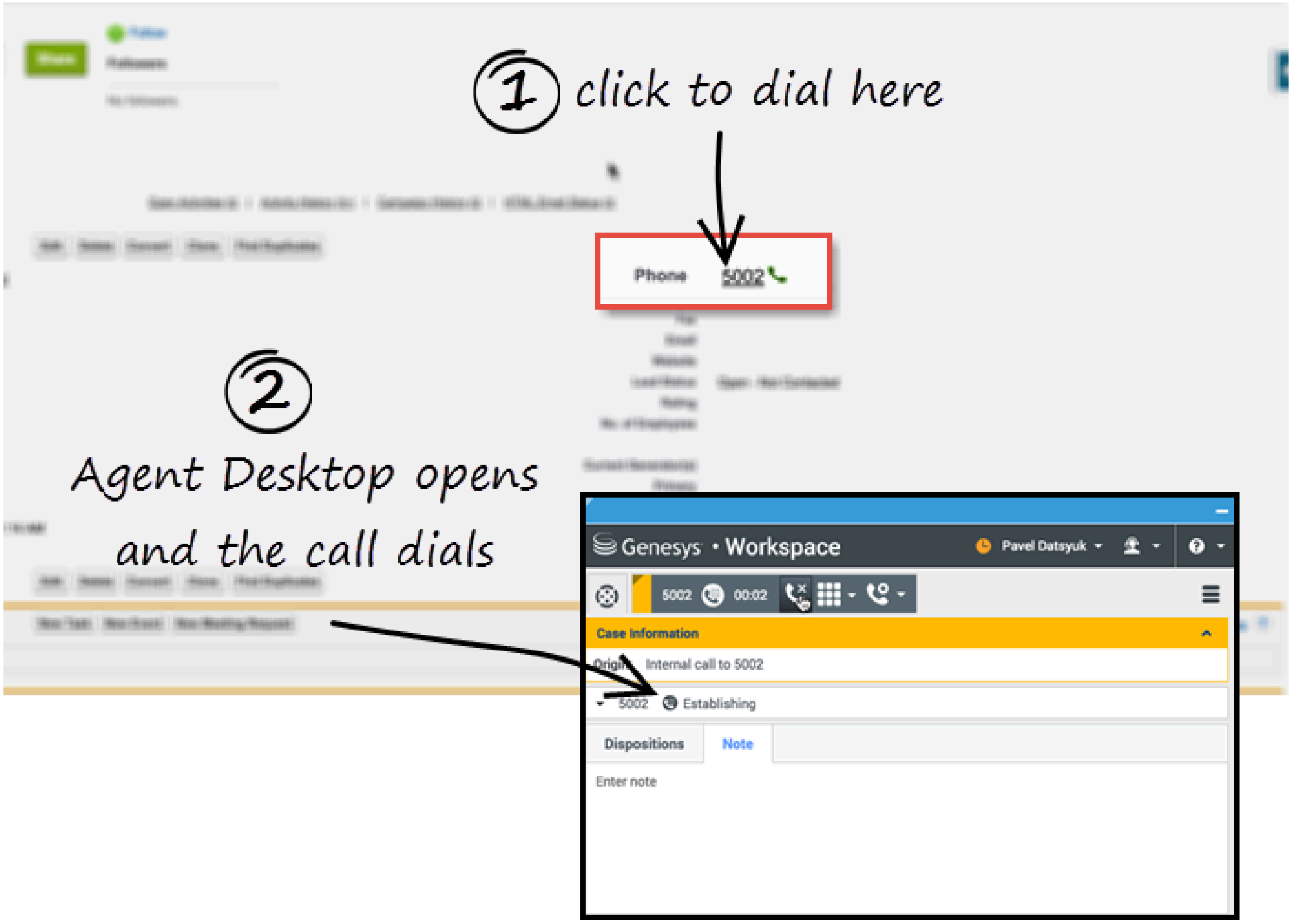
- For agents—To learn how to use Agent Desktop, see Agent Desktop Help.
- For administrators—To integrate the Agent Desktop console, see Installing and Configuring Agent Desktop with Salesforce Console.

Supported features

The Agent Desktop console includes some features that integrate with your sales or service console. This means that actions that you take in the console or the Agent Desktop console can be seamlessly passed to each other.

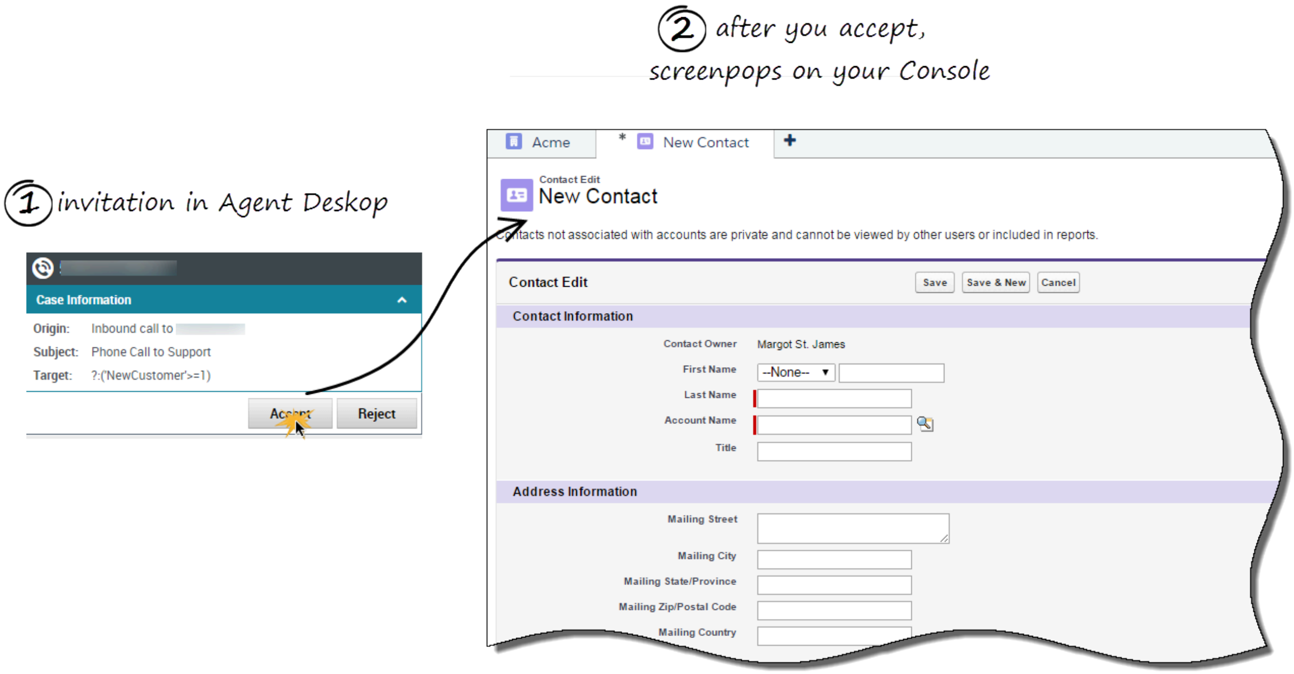
Supported features include:

Using Click-To-Dial



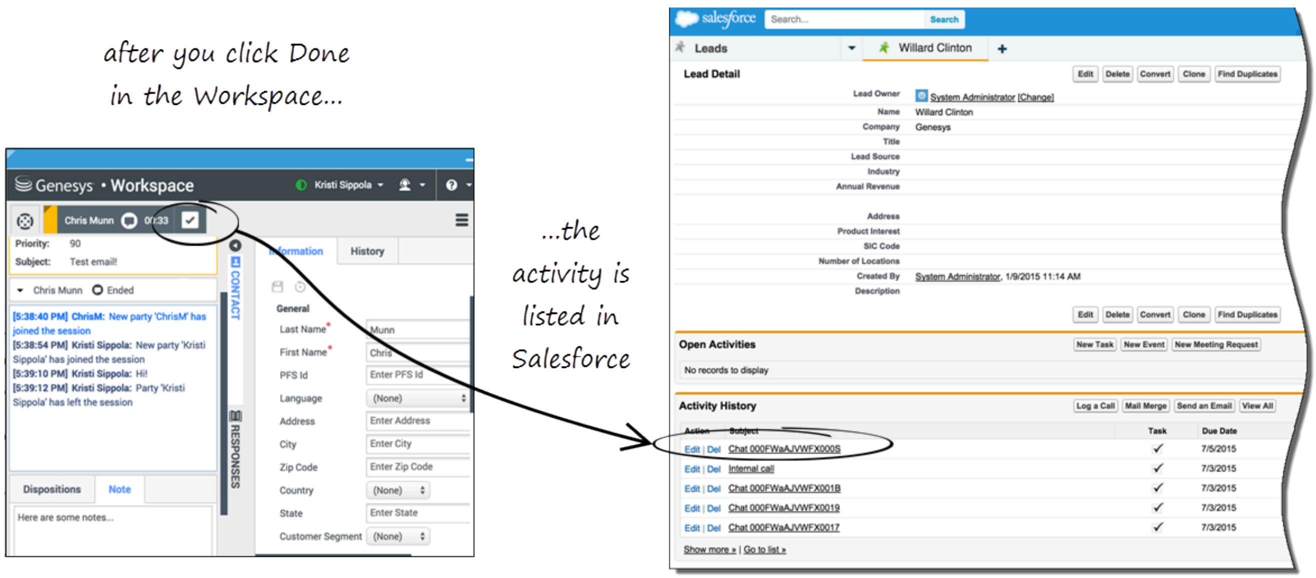
With click-to-dial, when you click a phone number in your console, Agent Desktop automatically dials it and starts the call. For example, you might search for a contact and then click the related phone number.

Screen pops



Screen pops are contact records that are displayed when an agent receives or makes a call, chat or email in Agent Desktop. Your console can display one or more related records, depending on what information it has about the customer. For example, if a customer enters their case number before they talk to the agent, your console displays the case automatically when the agent receives or makes the call in Agent Desktop. If there is no contact information available, the **New Contact** page is displayed.

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.

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

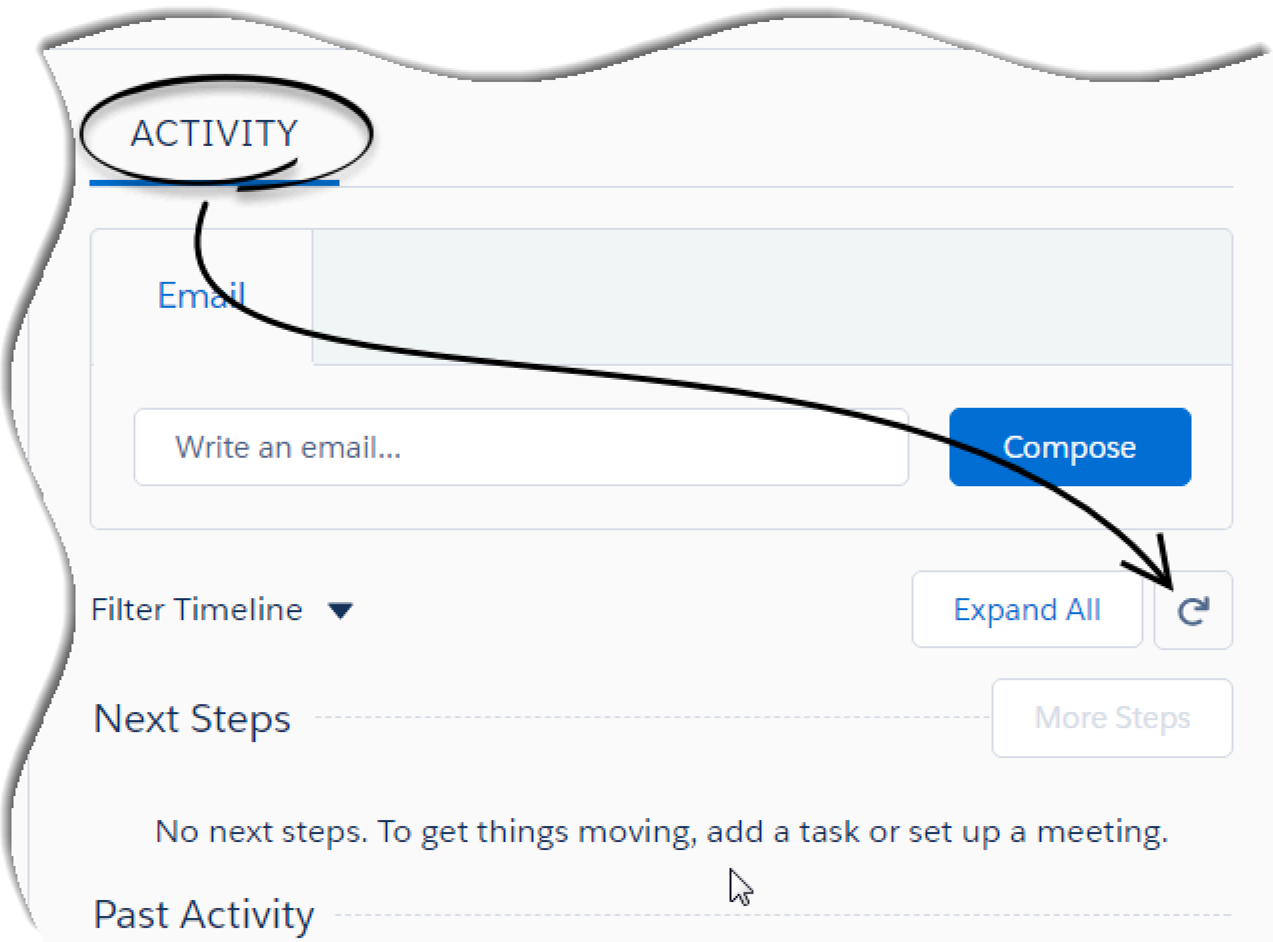
- If you use the Mozilla Firefox web browser, issues might occur if you pop the Agent Desktop console out to a new browser window or if you move the Agent Desktop console within the Salesforce sales or service console.
- In Lightning Experience mode, you cannot move, pop out, or resize the Agent Desktop

> window. The size of the window is pre-configured during deployment.

Lightning Experience in Gplus Adapter for Saleforce - WWE option

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

Activity history



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.

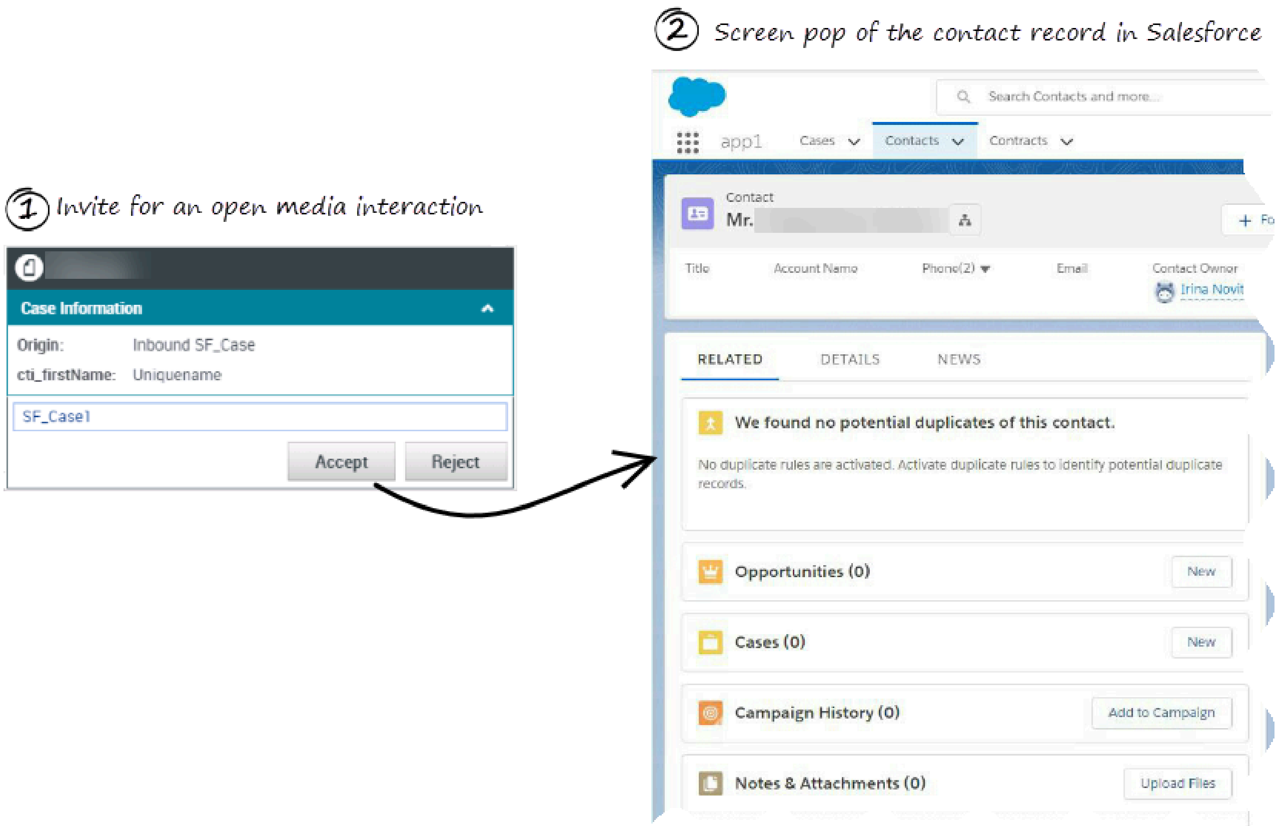
Like any other interaction, you can set your status to ready, accept and work on the open media interaction, transfer to an agent, set disposition, and mark done. You can view your open media activity details under Activity History.

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.

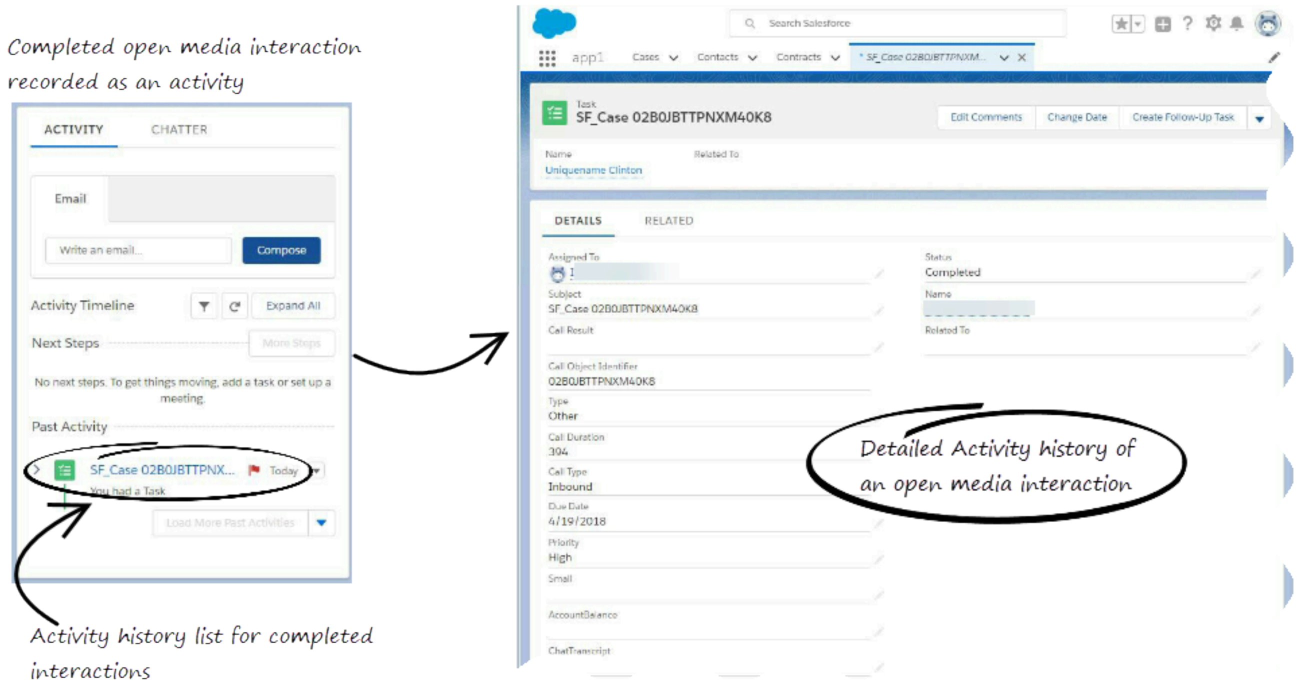
Screen pop for Open Media



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