GENESYS™

Web Services and Applications Configuration Guide

Gplus Adapter for Salesforce

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Review the sections below for more information about how to configure these features in the Gplus Adapter for Salesforce. See Gplus Adapter for Salesforce Configuration Options for the full list of options that apply to the adapter.

Activity history

By default, the adapter updates certain Salesforce activity fields when it saves an activity history entry at the end of a call or chat. Take a look at the table below for the full list of Salesforce activity fields and where the data comes from in the adapter.

Salesforce Activity Field	Genesys
Assigned To	Agent accepting Call
Created By	"
Last Modified By	"
Subject	Text (including the type of call, such as inbound, outbound to #Phonenumber). You can also define the subject using Custom templates.
Due Date	Current Timestamp
Related To	Record currently in context when an agent clicks **Mark Done**
Comments	Text with information from the Subject, Case Data (the full set that comes from the adapter), and Note (note data added by the agent) fields.
Status	Values are preset in the Salesforce configuration
Priority	Values are preset in the Salesforce configuration
Call Duration	Duration in seconds
Call Object Identifier	Interaction Id
Call Type	Type of call, such as inbound, outbound, or internal

You can also define a mapping between custom activity field names in Salesforce and Genesys UserData keys so that these custom fields are populated when the adapter saves an activity history entry at the end of a call or chat. This is useful when you want to include or use call- or chat-related data in your Salesforce reports.

To enable this functionality, set the salesforce.activity-log.field-mapping option to the name of a configuration section that contains the mapping.

> **Important**
> If you change the value of salesforce.activity-log.field-mapping, make sure to validate the change by confirming that Salesforce tasks are created correctly.

You can control which types of calls and chats are saved to a Salesforce activity history entry by setting the salesforce.activity-log.enabled-call-types and salesforce.activity-log.enabled-chat-types.

Chat transcript

The adapter can save chat transcript text either as part of the activity description in Salesforce or it can save the text to a custom field name in Salesforce.

By default, the adapter saves the transcript as part of the description, but you can turn off this functionality with the salesforce.chat.include-transcript-in-desc option. You might want to do this if the transcript and case data are too large for the description field, which has a maximum size of 32K. In this case, you can set the salesforce.chat.transcript-custom-field-name option to the name of a custom field you defined in Salesforce — the adapter will save chat transcripts to this field instead.

> **Important**
> If you change the value of salesforce.chat.transcript-custom-field-name, make sure to validate the change by confirming that Salesforce tasks are created correctly.

Custom templates

You can specify what the adapter saves for the subject field in the Salesforce activity by using custom templates with the templates.salesforce.<interaction type>.<salesforce argument> option, where:

- <interaction type> is either `inbound-voice`, `outbound-voice`, `transfer-voice`, or `chat`.
- <salesforce argument> is `subject` (the adapter currently supports only this argument).

The value is a string that contains any text, along with templating variables wrapped in the reserved "`{`" and "`}`" characters.

You can use as many instances of this option as you need to handle multiple interactions types. For example, your configuration could include options for each of the supported interaction types:

- templates.salesforce.inbound-voice.subject
- templates.salesforce.outbound-voice.subject
- templates.salesforce.transfer-voice.subject
- templates.salesforce.chat.subject

The adapter supports the following templating variables:

Variable	Description
interaction.ani	The number that originated the call. This variable identifies the caller for inbound calls and is best used in inbound templates.
interaction.callType	The type of call (inbound/outbound).
interaction.caseId	The unique ID of the related case.
interaction.contact	The first and last name of contact.
interaction.dnis	The last call dialed (useful for call transfer). This variable identifies the outbound location for outbound calls and is best used in outbound templates.
interaction.endDate	The date and time when interaction ended.
interaction.isConsultation	This is true if the interaction is a consultation.
interaction.startDate	The date and time when the interaction started.
userData.<key>	This can be any UserData key available for the interaction. You might also find some of the following UserData keys useful (they're included by default by Workspace Web Edition on transfers): • userData.GCS_TransferringAgentName — The name of the transferring agent. • userData.GCS_TransferringDate — The date and time of transfer. • userData.GCS_TransferringEmployeeId — The ID of the transferring employee. • userData.GCS_TransferringReason — The reason for the transfer. This is an empty string if no reason exists.
contact.EmailAddresses	A list of email addresses associated with the contact.
contact.PhoneNumbers	A list of phone numbers associated with the contact.

For example, you might want the activity for all inbound voice calls to have details about the customer's name and phone number. In this case, here's how you would configure the option:

```
templates.salesforce.inbound-voice.subject = Customer: {interaction.contact}, Phone Number: {interaction.ani}
```

If a call comes in from Willard Clinton at 123-456-7890, when the call ends the adapter creates the related activity in Salesforce with following subject field: `Customer: Willard Clinton, Phone Number: 123-456-7890`

Another common use case might be to include information from UserData for all inbound calls. This could come from your own UserData keys or from UserData provided by Workspace Web Edition (see the table above). For example, you want the activity history's subject to include information from your own UserData key, PurposeOfCall, and the contact's name. Here's how you should configure the option:

```
templates.salesforce.inbound-voice.subject = Call from {interaction.contact} about {userData.PurposeOfCall}
```

In this scenario, if Willard Clinton calls into the contact center and chooses the Technical Support option in the IVR, that information is saved in the PurposeOfCall UserData key. When the call ends, the adapter creates the related activity in Salesforce with the following subject field: `Call from Willard Clinton about Technical Support`

Attached data

You can configure the adapter to save the ID, name, and type of the focused Salesforce object to attached data when an agent clicks **Mark Done**. To do this, set salesforce.user-data.object-id-key, salesforce.user-data.object-name-key, and salesforce.user-data.object-type-key to the keys you want the adapter to use when saving the ID, name, and type. Also, make sure the Workspace Web Edition option interaction.case-data.is-read-only-on-idle is set to `false`.

You should consider setting these options if you want to make sure the ID, name, or type is added to attached data when agents create a new object during a call.

Editing attached data

Agents can add, update, or delete attached data on active calls or chats when you set the interaction.case-data.enable-advanced-view option to `true`. You can control which attached data fields agents can edit by setting up Business Attributes, as detailed in the Editing Case Information topic.

Displaying clickable links in attached data

The adapter displays clickable links in attached data when you set the interaction.case-data.enable-advanced-view option to `true` and set the interaction.case-data.enable-hyperlink Workspace option to `true`. You should also make sure the expression.url Workspace option is set to a regular expression that identifies URLs. This option is already set by default to match most valid URLs. See Displaying Active URLs in Case Information for details.

Ordering attached data

You can define the order of attached data fields in the adapter by setting the interaction.case-data.enable-advanced-view option to `true`. You'll also need to define Business Attributes for the attached data fields — see Editing Case Information for details about setting up Business Attributes. Next, create an **[interaction-workspace]** section in the annex of the Business Attribute, then add the **interaction.case-data.order** option. This option is a comma-separated list of Business Attributes Value Names that specifies the order of the Business Attribute Values. The Business Attributes Values that are not listed in this option are put at the bottom of the list.

Call back

You can call back a disconnected participant from the call by using the Participants menu in the adapter by setting contact.ucs-interaction.voice.enable-create option to `true` and interaction.disposition.is-mandatory option to `false`. Adapter offers this feature by leveraging Genesys Universal Contact Server (UCS) settings for voice option.

Call recording

You can enable call recording in the adapter by setting the Workspace Web Edition option privilege-active-recording.can-use option. If you set this option to `true`, agents see the call recording split button on the voice toolbar, which they can use to start, stop, pause, and resume recordings.

Chat

The adapter currently offers two media channels: voice and chat. To enable chat in the adapter, just set the corresponding privilege option in Workspace Web Edition: privilege.chat.can-use.

As with all Workspace Web Edition options, you can set these options on the Application, Agent Group, Person, and so on. For example, you might want all your agents to be able to access the voice channel, but only some to access the chat channel. In this scenario, you could set privilege.voice.can-use on the Application so that all agents can use this media channel. At the same time, you could also set privilege.chat.can-use on a particular Agent Group so that only agents in that group can use the chat channel.

> **Important**
> You must configure at least one media channel in order for the adapter to work.

Chat transfers and consultations

To enable chat transfers and consultations, see the "Chat" row in the Workspace Web Edition Options table for the full list of chat privileges the adapter supports.

Sending a URL

You can configure the adapter so that an agent participating in a chat can push a URL for a customer to click. To enable this feature, just set the privilege-chat.can-push-url option to `true`.

Direct outbound calls to a route point

You can configure the adapter to direct all outbound calls through a route point. **Note:** You need to load a routing strategy that takes responsibility for delivering the call. To enable this functionality in the adapter, set the following Workspace Web Edition configuration options:

- intercommunication.voice.routing-based-actions

- intercommunication.voice.routing-based-targets
- intercommunication.voice.routing-points

For example:

```
intercommunication.voice.routing-based-actions: MakeCall,OneStepConference,InitConference,OneStepTransfer,InitTransfer
 intercommunication.voice.routing-based-targets: TypeDestination
 intercommunication.voice.routing-points: 9000
```

If you use this configuration, the call is delivered to the route point with the following UserData fields:

- IW_BundleUid
- IW_CaseUid
- IW_RoutingBasedOriginalEmployeeId
- IW_RoutingBasedRequestType
- IW_RoutingBasedTargetId
- IW_RoutingBasedTargetType
- PhoneNumber

Disposition

You can decide whether to hide or show the Disposition section in the voice detail view by setting the interaction.hide-disposition option. **Note:** If you set the Workspace Web Edition option interaction.disposition.is-mandatory, then the Disposition will be shown regardless of the value of **interaction.hide-disposition**.

If interaction.disposition.is-mandatory is true, when marking a call or a chat done without selecting a disposition, the warning message displayed is now in the format: You must select a <Business Attribute Display Name> before closing, where <Business Attribute Display Name> is the configured business attribute display name.

For details about how to configure Disposition Codes, see Enabling Disposition Codes and Disposition Codes in the Web Services API Reference.

Feedback

You can hide or show the Feedback item in the main menu by setting the system.feedback option. When an agent submits feedback, the adapter automatically includes supporting information, such as configuration, logs for both the adapter and Workspace, and active interactions.

Focus following

You can enable focus following in the adapter so that it keeps track of which instance of the adapter is active when there are multiple instances running in multiple browser tabs or windows. Only the active adapter sends screen pop requests to Salesforce, which prevents duplicate requests and multiple screen pops. This can be helpful if you're using Salesforce standard mode and configure screen pops to open in a new tab or window (which opens a new instance of the adapter in the tab or window).

To enable this feature, set the salesforce.enable-focus-following option to `true`. You should also set multiple-instance.enable-mark-done-sync to `true` so that the agent only has to click **Mark Done** once when the call is finished.

Free seating

The adapter supports free seating, which enables an agent to confirm or change the resources (such as a phone number) he or she will use for a given session. This is important when agents work together in an office where there is no assigned seating or when different agents sit at the same seat on different shifts. Instead of having a specific phone number assigned to the agent by the administrator, the agent instead enters the phone number he or she will use after finding a seat at the beginning of the shift.

If the agents work in different locations at different times, you can also use this feature so they can enter a phone number based on where they're working.

The adapter provides two modes of free seating:

- Mode 1 — The agent can enter a phone number. Enable this mode with the login.voice.prompt-dn-less-phone-number Workspace Web Edition option.
- Mode 2 — The agent can enter a place name. Enable this mode with the login.prompt-place Workspace Web Edition option.

> **Important**
> If you set both options, `login.prompt-place` takes precedence.

In-focus page transfers

When an agent performs a voice or chat conference or transfer, the adapter can update the UserData with the ID of the object the agent is looking at in Salesforce. This makes sure that the agent who receives the conference or transfer gets a screen pop for the most relevant object.

This can be helpful when:

- There are multiple matches for a screen pop search on the initial call and the agent has to select between them
- There are no matches for the initial screen pop search and the agent creates a new record

To enable in-focus page transfers, set the salesforce.enable-in-focus-page-transfer option to `true`.

When the adapter updates the UserData, any existing UserData keys that begin with "id_" or "cti_" are removed and a new key, called "id_transfer_object", is added with the object ID of the focused page. If the focused page doesn't correspond to a Salesforce object, the adapter does not make an update and the existing UserData is sent with the conference or transfer request.

If you configured your environment to use a key other than "id_" or "cti_" (basically if you need to set the **screenpop.id-key-regex** option as described in Screen pop), then you must also set the screenpop.transfer-object-key to your custom key in order for screen pop to work. The adapter will add the key you specify in this option instead of "id_transfer_object".

International dialing

You can configure the adapter to apply custom pre-processing rules on click-to-dial requests and before initiating screen pops. You can use this to adjust the format of phone numbers or ANI for international dialing.

To support click-to-dial for international numbers, you can set up pre-processing rules so that the adapter examines the phone number it receives from Salesforce to determine if a prefix should be added before making the dial request. This can be helpful when local numbers are stored in Salesforce records, but dialing prefixes are required in order to dial the call. You can configure pre-processing rules with the click-to-dial.preprocessing-rules option.

You can also define pre-processing rules for the screen pop to replace a portion of the ANI — for example, to remove a leading +1. This can be helpful in cases where local phone numbers are stored in Salesforce, but inbound customer calls might include international prefixes. You can configure these rules with the screenpop.preprocessing-rule option.

Login

You can configure the adapter to enable an agent to enter or select a queue when logging in for voice. Set the login.voice.prompt-queue Workspace Web Edition option to enable this feature.

You can also enable an agent to select from a pre-defined list of queues, instead of entering one manually, by setting the login.voice.list-available-queues Workspace Web Edition option to a comma-separated list of queue numbers.

You can configure the default view of the adapter by using the login.default-view option. Currently, voice and statistics views are supported as default views. **Note:** If you are configuring statistics view as the default view, you must set the statistics.allow-footer-view option to `true` and then set the login.default-view option to `statistics`.

Not Ready reason codes

For details about how to configure Not Ready Reason Codes, see Declaring and using new Not-Ready Reason codes in the Web Services API Reference.

Reports and statistics

The adapter provides reports and statistics through three different options in the main menu:

- **Reports** — In this view, agents can see details about call activity, call handle time, and routing point metrics, including the maximum and average wait times for the selected routing point. You can also control how often the values are refreshed with the statistics.refresh-time option. For the routing points view, make sure you configure the routing points you want agents to be able to see by setting the statistics.routing-points Workspace Web Edition option.
- **My Statistics** — In this view, agents can see Key Performance Indicators (KPIs) that you configure. If you don't configure any KPIs, the adapter hides the **My Statistics** in the main menu.
Note: The Enabling Agents to View KPIs and Contact Center Statistics page lists a number of attributes that apply to each statistic. The adapter currently only supports the **statistic-name** attribute. The adapter also supports the **display-name** attribute, which specifies the display text that appears with the value in the My statistics view.
- **Contact Center Statistics** — In this view, agents can see statistics you configure that summarize the state of various conditions monitored by your call center, such as the number of abandoned calls, the number of total answered calls, and the average waiting time. If you don't configure any contact center statistics, the adapter hides the **Contact Center Statisics** in the main menu. For the routing points view, make sure you configure the routing points you want agents to be able to see by setting the statistics.routing-points Workspace Web Edition option.
You can also configure the **Statistics** icon on the Adapter's footer bar to display a badge with a number. The number on the badge represents the value of a statistical parameter in a specific resource. Use statistics.badge-resource option to configure the resource and use statistics.badge-statistic option to configure the statistic to be queried within the resource. **Note:** The Enabling Agents to View KPIs and Contact Center Statistics page lists a number of attributes that apply to each statistic. The adapter currently only supports the **statistic-name** attribute. The adapter also supports the **display-name** attribute, which specifies the display text that appears with the value in the Contact Center Statistics view.

Screen pop

When an agent receives an external call, the adapter initiates a screen pop that causes Salesforce to show an appropriate record for the caller. See Configuring screen pops in Salesforce for details. By default, the adapter initiates the screen pop when the call is established, but you can set the screenpop.on-ringing option to initiate a screen pop when the call is ringing instead.

> **Important**
> You can also enable this feature for internal calls with the screenpop.enable-for-internal-calls option.

Here's the default way the adapter determines what to ask Salesforce to show in the screen pop:

- If the UserData for the call has key(s) with the prefix "id_" (such as "id_SalesforceCaseId"), then the first value the adapter finds is sent in the screen pop request to Salesforce.
- If the UserData does not include any "id_" keys, the adapter builds a search string using a combination

of the ANI, if available, and any UserData values with keys that have the "cti_" prefix (such as "cti_FirstName" or "cti_PhoneNumber"). You can specify whether the search should include the ANI by setting the screenpop.include-ani-in-search option.

- If there are no "id_" keys, no ANI, and no "cti_" keys, then the adapter doesn't send a screen pop request.

Alternatively, you can configure the expressions the adapter uses to match screen pop UserData keys for the ID and search fields using the screenpop.id-key-regex and screenpop.search-key-regex options, respectively. Note that these options only change the criteria by which keys are matched from UserData. The existing logic and order between ID-based screen pop and search are unchanged (see the bullet points above). If you use these regular expression options to match your own ID key, then you should also make sure to set the screenpop.transfer-object-key option so that screen pop works with in-focus page transfers.

Screen recording

The Adapter supports Genesys Interaction Recording (GIR) Screen Recording Service (SRS). For an overview of Genesys Interaction Recording, see About Genesys Interaction Recording. To configure Genesys Interaction Recording for the Adapter, see Enable Screen Recording in the *Genesys Interaction Recording Solution Guide*. In this procedure, use the *Integrating with Workspace Web Edition* section.

Note:

- SRS is only supported for the Voice channel.
- SRS does not support using the Adapter in multiple browser tabs.
- SRS is not supported when the Adapter is popped out of the Salesforce console window.

Team communicator

Team Communicator can display corporate favorites (quick dial favorites) that you configure using the teamcommunicator.corporate-favorites Workspace Web Edition option. You can also let agents add their own favorites by setting the privilege.teamcommunicator.can-manage-favorites Workspace option to `true`.

You can make it easier for your agents to find people in Team Communicator by enabling filters. Use the teamcommunicator.list-filter-showing Workspace option to specify the list of filters that an agent can choose from in Team Communicator — Agent, AgentGroup, Skill, RoutingPoint, and so on.

You can also enable your agents to view and search a list of recently contacted resources in Team Communicator by setting the following Workspace options:

- privilege.teamcommunicator.can-view-recent-calls — Turns on the list of recent targets. The default value is `true`.
- teamcommunicator.recent-max-records — Sets the maximum number of items to keep in the list.
- teamcommunicator.add-recent-filters.voice — Filters what types of calls (internal, external, consultation)

are placed in the list.

Availability for agent groups

While the adapter automatically shows agent availability, if you also want to display whether there are available agents for a particular agent group on the voice channel, set the following Workspace options to `true`:

- privilege.teamcommunicator.display-agent-groups-availability
- presence.evaluate-presence

Toast and case data

For details about how to configure Toast and Case Data, see Outbound Contact - Provisioning Case Data and Toast And Case Data in the Web Services API Reference.

Transfer notes

You can use the call note field to allow one agent to provide information to another agent who will receive a conference or transfer. To enable this feature, make sure you set the Workspace Web Edition option `voice.note.key-name` to the desired attached data key. If you don't set it, the adapter hides the notes section in the voice view.

When the agent adds information to the call note before initiating a conference or transfer, that information is added to the value for the attached data key you specified in the `voice.note.key-name` option. Then the agent can proceed with the conference or transfer.

When the second agent receives the call, the call note field is populated using the attached data field, which allows the agent to review and pick up where the first agent left off. This is particularly useful in cases where an agent blind transfers a call and isn't able to speak directly with the second agent before hanging up.

Voice

The adapter currently offers two media channels: voice and chat. To enable voice in the adapter, just set the corresponding privilege option in Workspace Web Edition: privilege.voice.can-use.

As with all Workspace Web Edition options, you can set these options on the Application, Agent Group, Person, and so on. For example, you might want all your agents to be able to access the voice channel, but only some to access the chat channel. In this scenario, you could set privilege.voice.can-use on the Application so that all agents can use this media channel. At the same time, you could also set privilege.chat.can-use on a particular Agent Group so that only agents in that group can use the chat channel.

Important
You must configure at least one media channel in order for the adapter to work.

Voice Transfers and Consultations

To enable voice transfers and consultations, see the "Voice" row in the Workspace Web Edition Options table for the full list of voice privileges the adapter supports.

Caller ID

For outbound calling scenarios, you can configure the adapter to allow agents to select from a predefined list of caller IDs; the selected caller ID is then displayed to the person receiving the call.

To enable this feature, first create a Business Attribute in Genesys Administrator Extension that contains the possible caller ID values you would like agents to be able to select. In its Business Attribute Values, the name is used to specify the actual phone number the adapter dials. If the Display Name is specified, this is the information the adapter presents to the agent (in alphabetical order).

If the Business Attribute doesn't contain any Business Attribute Values, then the feature isn't enabled. Also, if the attribute contains only one value, then the adapter automatically uses that caller ID so the agent doesn't see a popup when making a call.

Next, set the Workspace Web Edition option intercommunication.voice.make-call-caller-id-business-attribute to the name of your Business Attribute.

For example, if you create a Business Attribute named **CallerID**, then you would set **intercommunication.voice.make-call-caller-id-business-attribute** to `CallerID`.

Voicemail

The adapter supports voicemail if your environment is set up for Genesys SIP Feature Server (previously called Genesys SIP Voicemail). To enable voicemail, set the following Workspace options: privilege.voicemail.can-use and voicemail.access-number.