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Web Services and Applications Deployment Guide

Installing and configuring the adapter in Salesforce

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Installing and configuring the adapter in Salesforce

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

If you want to enable Gplus Adapter in Salesforce Lightning after you install and configure the adapter in Salesforce, go [here](#).

The adapter installation procedure involves the following steps:

1. [Creating a Gplus Adapter URL.](#)
2. [Configuring Gplus Adapter for Salesforce.](#)
3. [Adding users to Call Center.](#)
4. [Configuring the Utility bar.](#)
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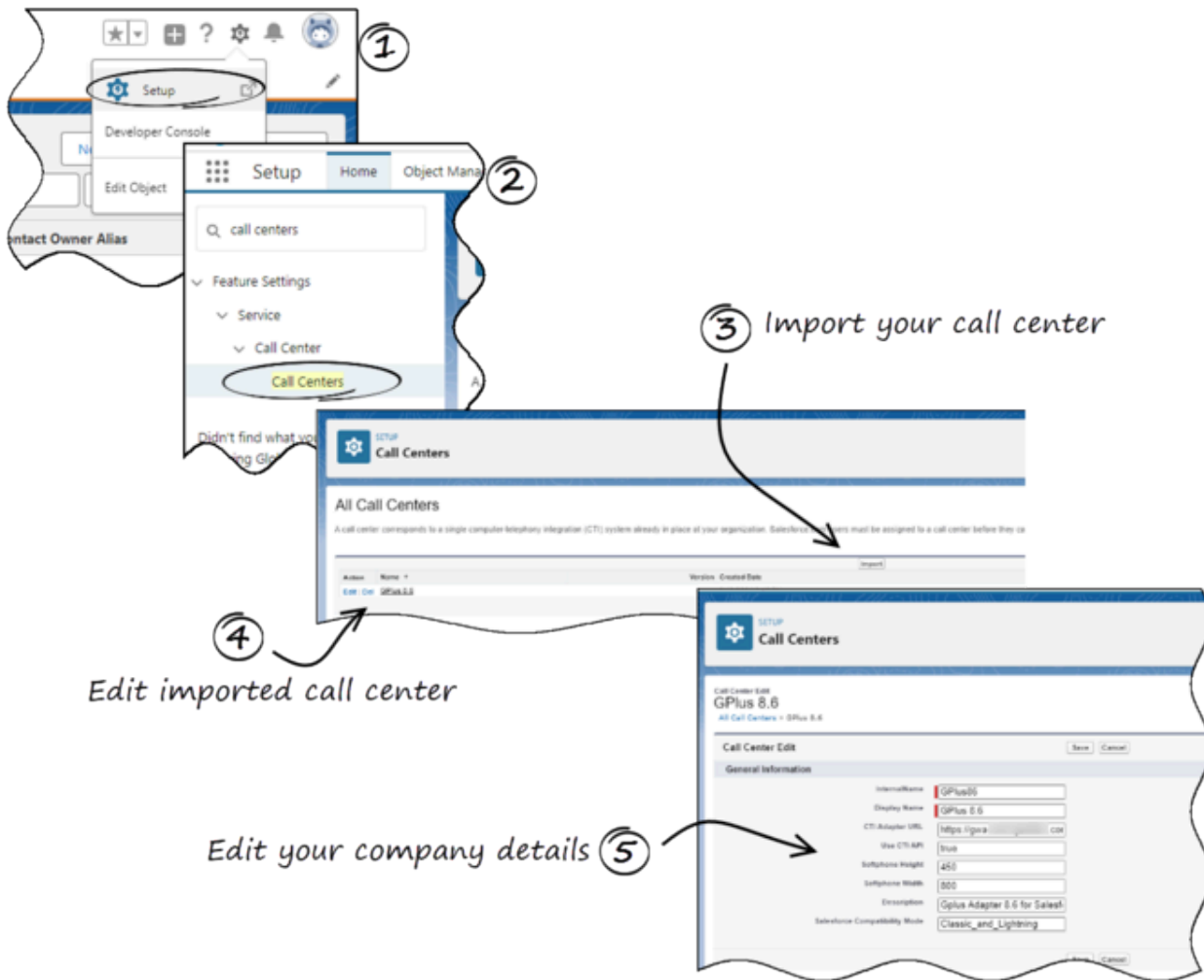
Creating a Gplus Adapter URL

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

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, Gplus86.
5. From the **Call Center Edit** page, 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**.

Call Center [Help for this Page](#) ?

Genesys Gplus for Salesforce: Manage Users

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

View: All ▼ [Create New View](#)

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

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

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

3. On the **Search for New Users** page, you can enter search criteria to find users. Select the ones you want to add to the Gplus Adapter for Salesforce.
4. Click **Add to Call Center**.

Genesys Gplus for Salesforce: Search for New Users

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

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

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

Filter By Additional Fields (Optional):

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

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

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

Call Center Help for this Page ?

Genesys Gplus for Salesforce: Manage Users

All Call Centers » Genesys Gplus for Salesforce » Manage Users

View: All ▼ [Create New View](#)

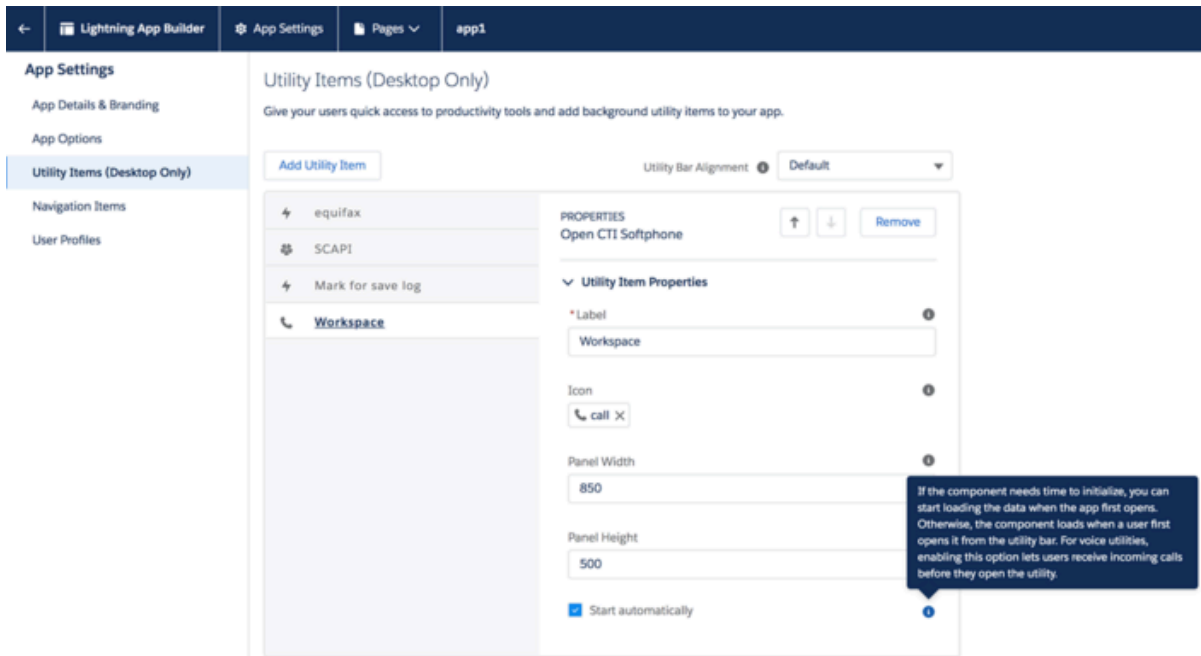
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

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

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

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



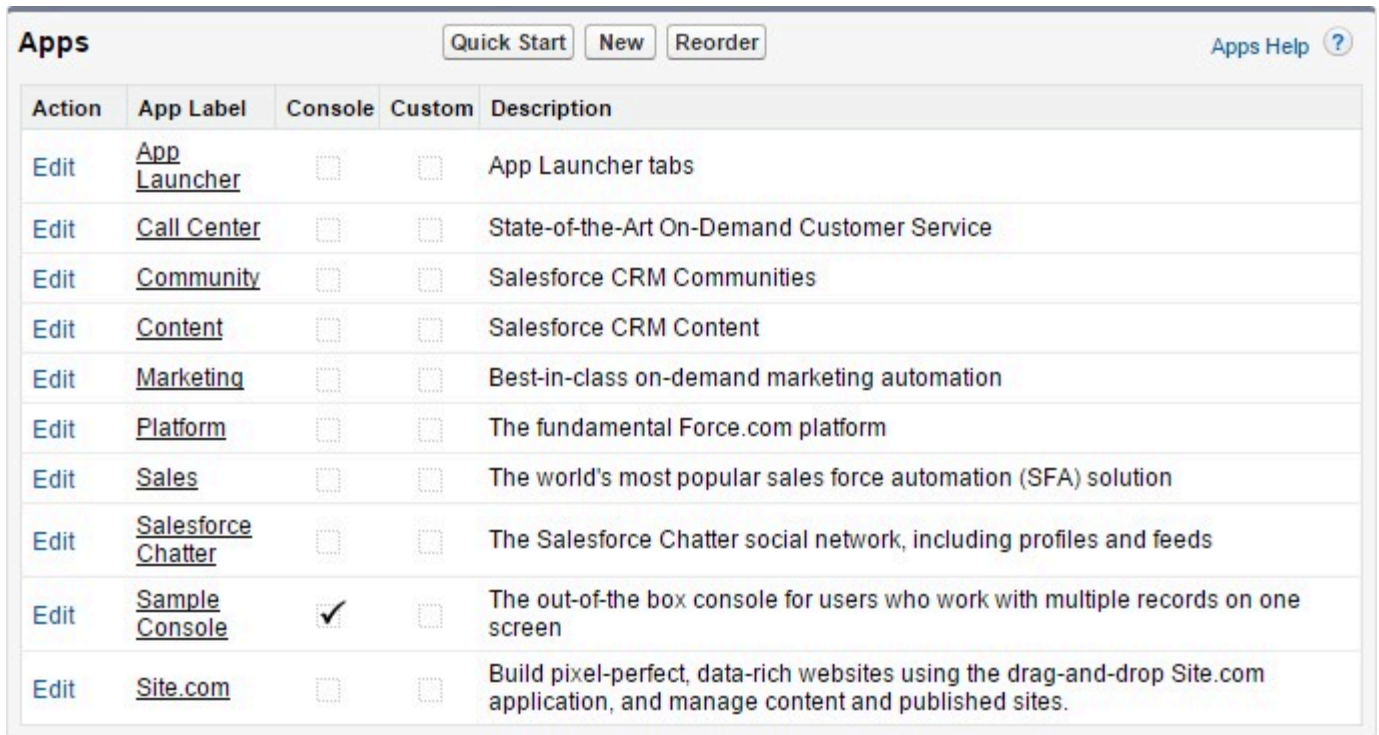
4. Specify **Navigation Items** and **User Profiles** for the new Lightning app by referring to Salesforce documentation.
5. Save the application.

Configuring the whitelist domain for your Salesforce Console

Complete this procedure to add the Genesys domain to the whitelist domains for your Salesforce Console. You need to complete this procedure to allow your users to access the adapter in Salesforce Console in a separate browser window.

Start

1. If you haven't already, login to Salesforce and go to **App Setup > Create > Apps** and select your console app — "Sample Console" in the image below:



Action	App Label	Console	Custom	Description
Edit	App Launcher	<input type="checkbox"/>	<input type="checkbox"/>	App Launcher tabs
Edit	Call Center	<input type="checkbox"/>	<input type="checkbox"/>	State-of-the-Art On-Demand Customer Service
Edit	Community	<input type="checkbox"/>	<input type="checkbox"/>	Salesforce CRM Communities
Edit	Content	<input type="checkbox"/>	<input type="checkbox"/>	Salesforce CRM Content
Edit	Marketing	<input type="checkbox"/>	<input type="checkbox"/>	Best-in-class on-demand marketing automation
Edit	Platform	<input type="checkbox"/>	<input type="checkbox"/>	The fundamental Force.com platform
Edit	Sales	<input type="checkbox"/>	<input type="checkbox"/>	The world's most popular sales force automation (SFA) solution
Edit	Salesforce Chatter	<input type="checkbox"/>	<input type="checkbox"/>	The Salesforce Chatter social network, including profiles and feeds
Edit	Sample Console	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The out-of-the box console for users who work with multiple records on one screen
Edit	Site.com	<input type="checkbox"/>	<input type="checkbox"/>	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and manage content and published sites.

2. Click **Edit**. In **Whitelist Domains**, add the host and port for your installation of **Web Services**. For example: 198.51.100.23:8090
3. Click **Save**.

End

Configuring screen pops in Salesforce

When an agent receives an external call, the adapter can initiate a screen pop that causes Salesforce to show an appropriate record for the caller. To set up this functionality in Salesforce, login and go to **Setup > Customize > Call Center > SoftPhone Layouts** to create a SoftPhone Layout. Check out the [Salesforce documentation](#) for details about configuration.

In general, there are a couple of things to consider when you set up a SoftPhone Layout for the adapter:

- The Gplus Adapter for Salesforce ignores the SoftPhone Layout settings that control call-related fields. Instead, the adapter gets this information from **toast and case data** you configure in the Genesys environment.
- Make sure you configure the **Screen Pop Settings** in the "CTI 2.0 or Higher Settings" section. These settings control whether the screen pop opens in a new window, tab, or Visualforce page.

See [Screen pop](#) for more information about configuring screen pops in your Genesys environment.

Accessing Gplus Adapter for Salesforce

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

