GENESYS™

Web Services and Applications Deployment Guide

Installing and configuring the adapter in Salesforce

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Contents

If you're using the WWE option, complete the procedures on this page to install and configure the 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.

Installing the adapter in Salesforce

Prerequisites

- You have installed and configured Web Services.

- You have set up SSL for Jetty. For more information, see Configure SSL.

Start

1. Open the following URL to install the latest Gplus Adapter for Salesforce package in Salesforce: https://login.salesforce.com/packaging/installPackage.apexp?p0=04to0000000C3VD If you're not logged in, Salesforce prompts for your username and password.

> ## Important
>
> The Salesforce installation package includes a call center definition. If you need to create additional call centers, you can find the latest call center definition file in the Web Services .war file. To get a copy of the file, navigate to the following URL:
>
> `http://<WS_HOST>:<WS_PORT>/ui/cti/callcenterdef/GPlusForSalesforceCallCenterDef.xml`
>
> - <WS_HOST> is your Web Services host name or IP address.
>
> - <WS_PORT> is your Web Services port.
>
> You can save this file locally and then upload to Salesforce to create a new call center.

2. Now you should see the **Install Genesys Gplus Adapter for Salesforce** page. Select an installation type. Generally, you should select **Grant access to all users**, but if you want to limit access to the adapter to specific profiles, then you can choose **Install for Specific Profiles …**. Click **Install**.
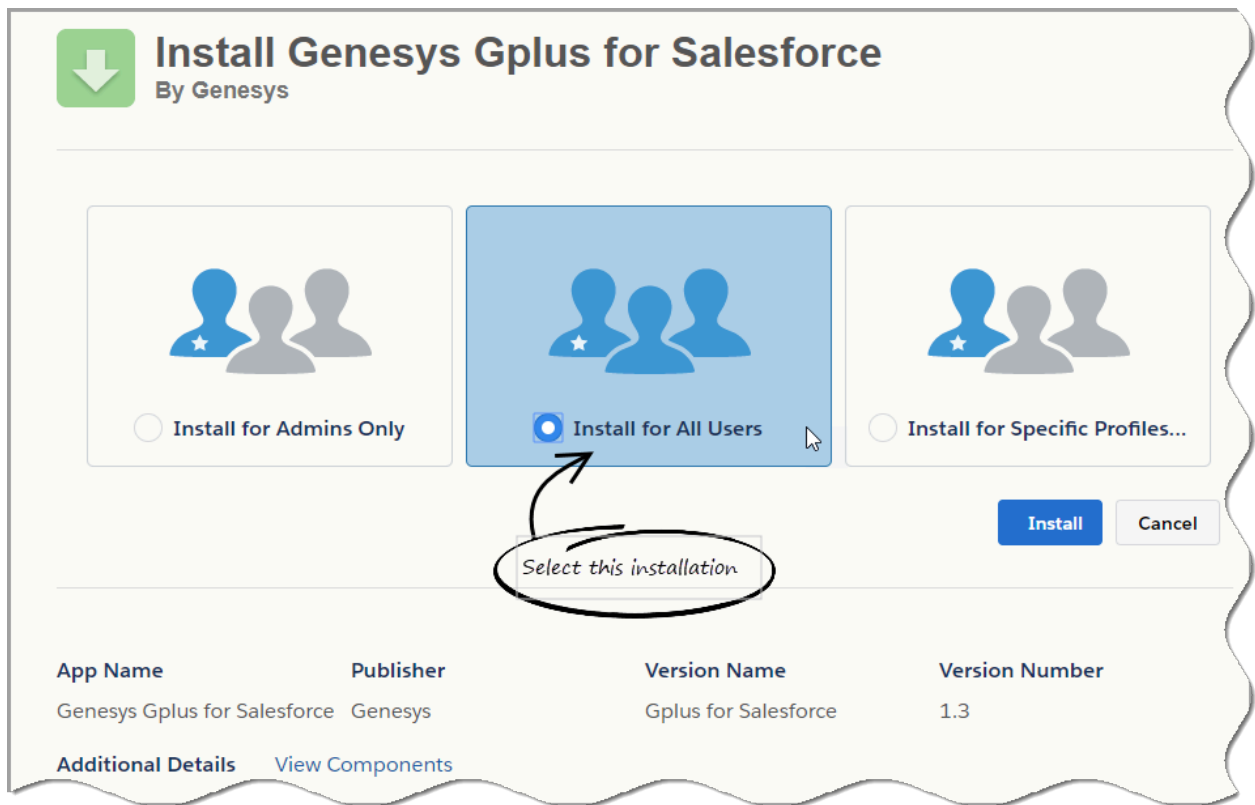
3. When you see the "Installation Complete!" message, click **Done**.

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

included in the list.

End

Configuring the adapter in Salesforce

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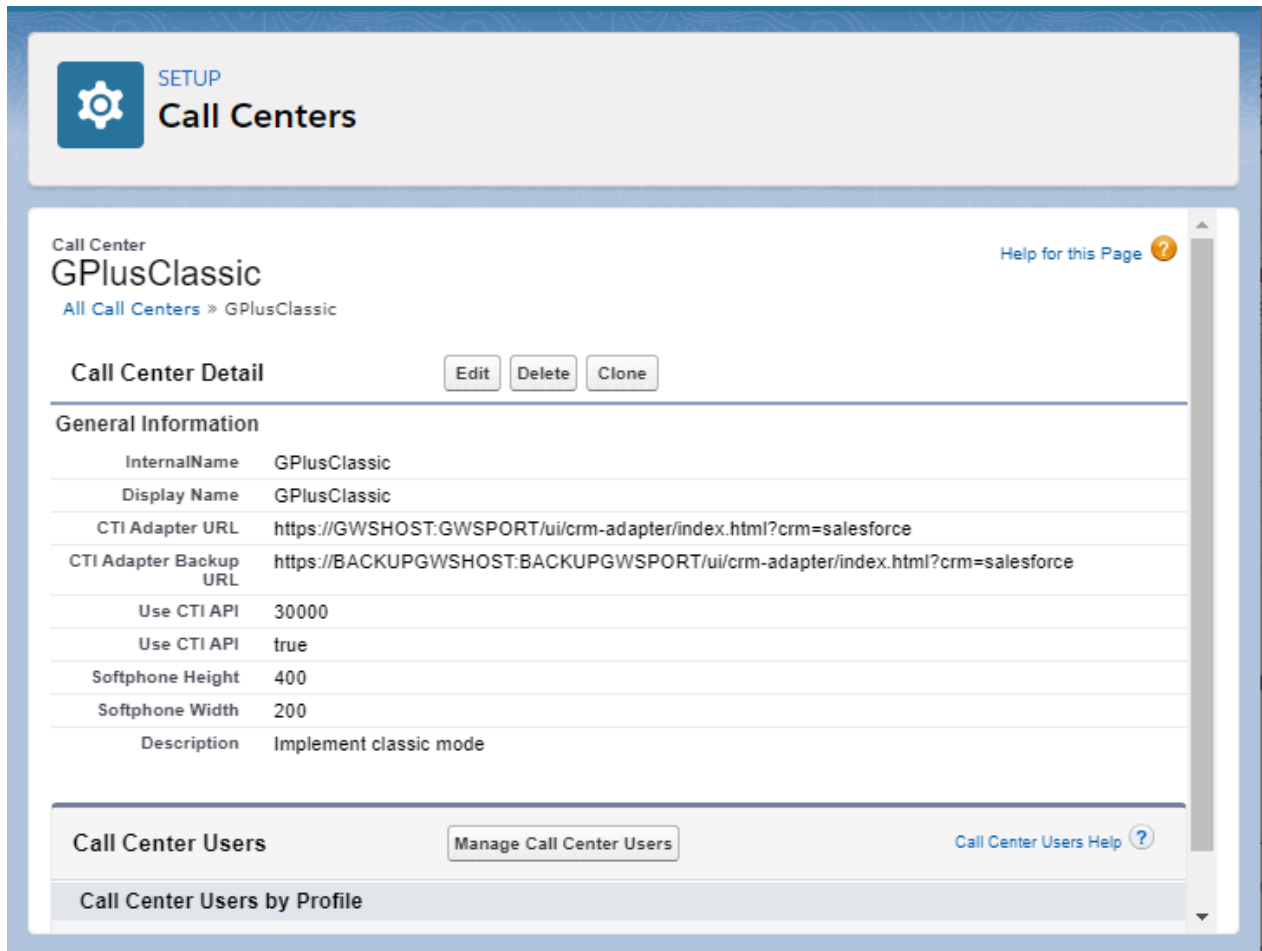
Start

1. If you haven't already, login to Salesforce and go to **Setup > Build > Customize > Call Center > Call Centers**. Or, you can search for "Call Centers" in the **Search All Setup** field and select the "Call Centers" result. You should see the **Introducing Salesforce CRM Call Center** page. **Note:** You must have administrator privileges.

2. You can select **Don't show me this page again** if you want to hide the page in the future, and click **Continue**.

3. On the **All Call Centers** page, click **Edit** next to the Genesys Gplus for Salesforce entry.

4. In the **CTI Adapter URL** field, replace the text with the following URL: `https://WS_HOST:WS_PORT/ui/crm-workspace/index.html` You'll need to change `WS_HOST:WS_PORT` to the correct host and port for your installation of Web Services. For example: `https://198.51.100.23:8090/ui/crm-workspace/index.html`

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

5. You might also want to adjust **Softphone Height** and **Softphone Width** to larger numbers (in pixels) so the adapter displays at an adequate size by default.

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

6. Click **Save**.

7. Click **Manage Call Center Users** and then click **Add users**.

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

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

9. To access the adapter in Salesforce Console, click the **Workspace** button in the bottom right corner.
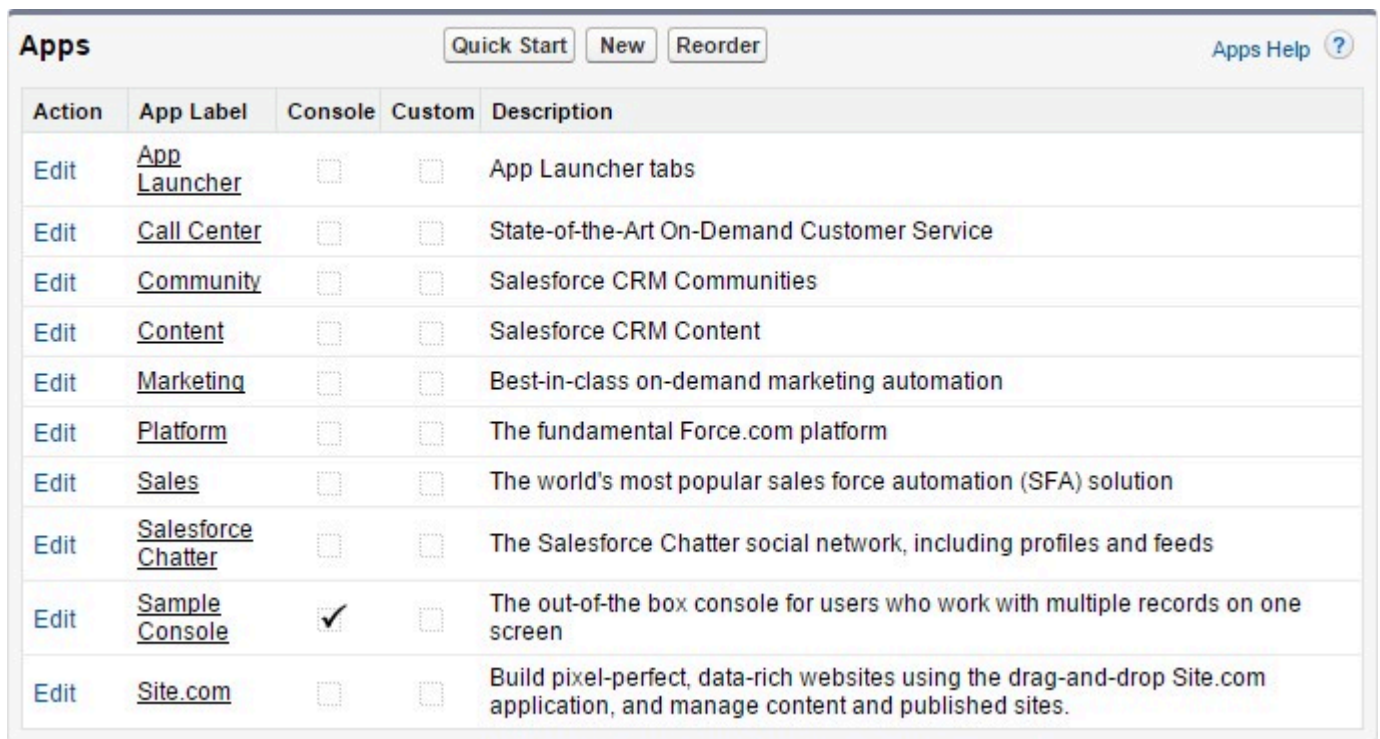

The adapter in Salesforce Console.

End

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:

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.