Web Services and Applications Configuration Guide

Gplus Adapter for Salesforce - WWE Option

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Review the sections below for more information about how to configure these features if you're using the WWE option.

Activity history

By default, the adapter updates certain Salesforce activity fields when it saves an activity history entry at the end of a call, chat, email, or outbound call for a preview mode campaign. 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).
Email body	Text from the email content field for inbound and outbound replies.
Due Date	Current Timestamp
Related To	Salesforce Record that the activity Task is associated with. This field represents an activity Task association. The field is updated with the open Salesforce Record ID when the interaction is completed.
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, chat, or email. This is useful when you want to include or use call, chat, or email 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`, `chat`, or `email`.
- <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.

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.

In-focus page transfers

When an agent performs a 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 initially 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".

Screen pop

Calls

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 so that screen pop works with in-focus page transfers.

Chats

When an agent receives a chat invite from a user, the adapter initiates a screen pop that causes Salesforce to show an appropriate record for the user. Based on the value set in the screenpop.chat.on-invite option, the adapter determines when to initiate a screen pop for chats.

Emails

When an agent receives an email invite from a user, the adapter initiates a screen pop that causes Salesforce to show an appropriate record for the user. Based on the value set in the screenpop.email.on-invite option, the adapter determines when to initiate a screen pop for emails.

Integrate your web application or website with the adapter

You can use the Service Client API to customize how your web application or website integrates with the Adapter. Genesys provides this API, which is based on window.postMessage, so that your application can access the Workspace Web Edition object model and bypass the cross-domain security limitations. For more information, see Service Client API.

Support for Genesys Interaction Recording

The Agent Desktop console supports Genesys Interaction Recording (GIR). For an overview of Genesys Interaction Recording, see About Genesys Interaction Recording.

Genesys Interaction Recording is only supported for the Voice channel and is not supported when Agent Desktop is popped out of the Salesforce console window.

To configure Genesys Interaction Recording for the Agent Desktop console, see Enable Screen Recording in the *Genesys Interaction Recording Solution Guide*. In this procedure, use the *Integrating with Workspace Web Edition* section.