

GENESYS

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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 for Salesforce in your Salesforce environment.

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

- Open the following URL to install the latest Gplus Adapter for Salesforce package in Salesforce: https://login.salesforce.com/packaging/installPackage.apexp?p0=04to000000C3VD If you're not logged in, Salesforce prompts for your username and password.
- 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**.

Install Ge By Genesys	nesys Gpl	us for Salesforce	
i Installation	Complete!		
App Name	Publisher	Version Name	Version Number
Genesus Golus for Salesforce	Genesus	Golus for Salesforce	1 3

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

Installe	ed Packages										Help for this Page
On AppExcha	ange you can browse, test drive, download, a	and install pre-built apps	and components right int	to your salesforce.com enviro	onment. <u>Learn M</u>	ore about Installing Pac	<u>kages</u> .	test and sust	amiza hofor	a daplaving	You salesforce appexchance
can deploy th	e components individually using the other fe	atures in setup or as a g	roup by clicking Deploy.		ind are not depic	, .	anows you to	test and cas	011126 06101	s deploying.	
Depending or	n the links next to an installed package, you on nackage, click Uninstall. To manage your pa	can take different actions	from this page.	Newly installed Gplu 	s Adapter p	vackage					Visit AppExchange »
Installed F	Packages	locago noonoco, onex me									
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install I	Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall I	Genesys Gplus for Salesforce	Genesys	1.3	g_gplus	9/11/20	18 2:54 AM		0	0	0	Passed
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2	Any previously uninstalled p	ackages							•		

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

- 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 GWS_HOST:GWS_PORT with the correct host and port for your installation of Web Services. For example: https://198.51.100.23:8090/ui/crm-adapter/index.html?crm=salesforce

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-adapter/ index.html?crm=salesforce&authType=saml

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

Call Center Edit				
Genesys	Gplus	for	Salesforce	

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Help	for	thie	Dage	(2)
Tielp	101	uns	raye	-

All Call Centers » Genesys Gplus for Salesforce

General Informat	ion	= Required Information
InternalName	GenesysGplusForSalesforce	
Display Name	Genesys Gplus for Salesforc	
CTI Adapter URL	https://198.51.100.23:8090/ui	
Use CTI API	true	
Softphone Height	400	
Softphone Width	200	

- 5. Click Save.
- 6. Click Manage Call Center Users and then click Add users.

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Call Cantors & Cana	our Colus for Solosfores	n n Managa Lisa		
call centers » Gene	sys Gplus for Salesforce	e » manage Use	rs	
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r: All ▼ Create N	Vew View			
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W: All ▼ Create N A B C D E F	New View G H I J K L M N	0 P Q R S	S T U V W	X Y Z Other
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w: All ▼ Create N A B C D E F ull Name ↑	New View G H I J K L M N Add More User Alias U	O P Q R S rs Remove User Isername	S T U V W rs Role	X Y Z Other Profile

7. 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**.

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	v	AND
None	▼None	•	AND
News		-	
None ilter By Additional Fields • You can use "o • For date fields, • For date/time fie	(Optional): "filters by entering multiple ite enter the value in following for elds, enter the value in following	ems in the third column, separ rmat: 23/03/2015 ng format: 23/03/2015 10:42 F	rated by commas.
None ilter By Additional Fields • You can use "o • For date fields, • For date/time fie	(Optional): "filters by entering multiple ite enter the value in following for elds, enter the value in following Eind	ems in the third column, separ rmat: 23/03/2015 ng format: 23/03/2015 10:42 F	rated by commas. PM

Full Name	Alias	Username	Role	Profile
Jackson, Helen	<u>hjack</u>	hjackson@genesysmail.com		Standard User

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

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Call Center	's » Genesys Gplus	s for Sal	estorce » Manage Users		
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V: All ▼ A B C I	Create New View D E F G H I I Full Name ↑	J K L Add Mo Alias	M N O P Q R S T U	Role	Y Z Other

8. To access the adapter in Salesforce Classic, look for it in the left pane of your browser; in Salesforce Console, click the **Phone** button in the bottom right corner.

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

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The adapter in Salesforce Classic

The adapter in Salesforce Console.

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.