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# Web Services and Applications Deployment Guide

Installing and configuring the adapter in Salesforce

# Installing and configuring the adapter in Salesforce

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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

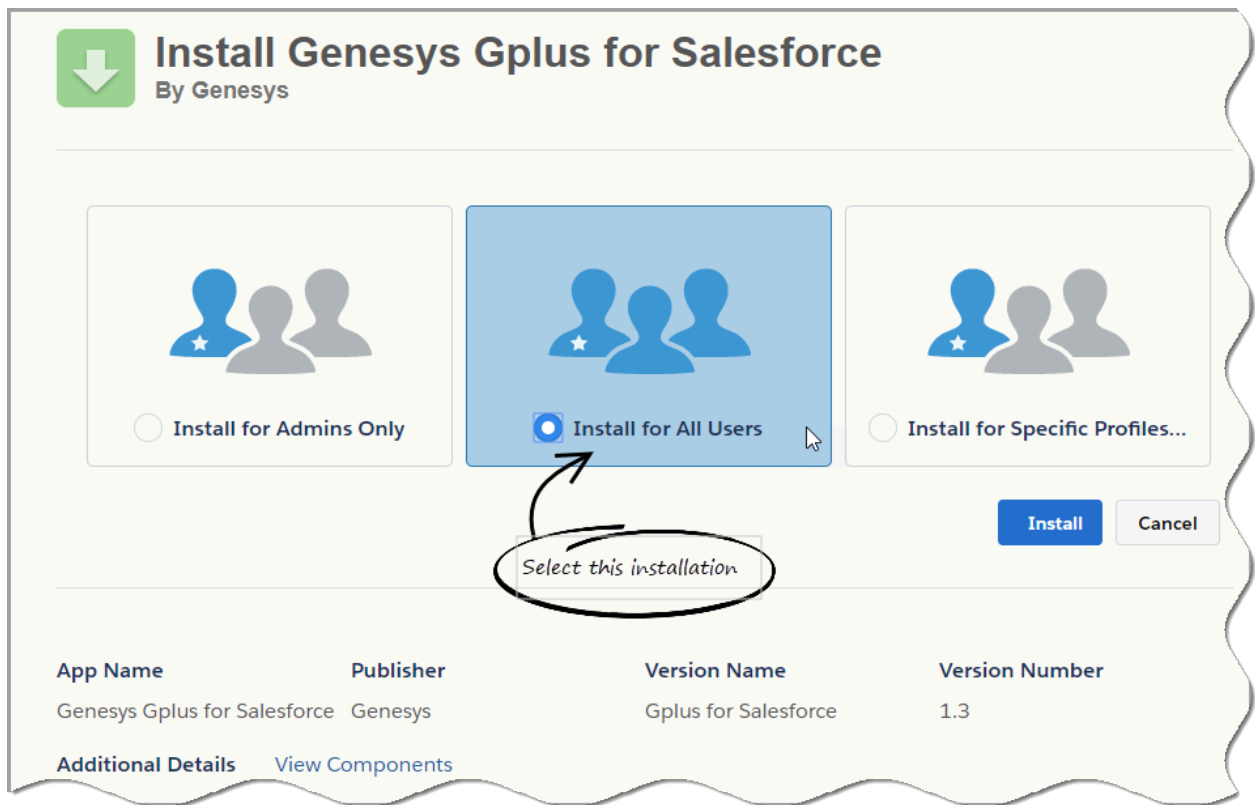
The Salesforce installation package includes a call center definition. If you need to create additional call centers, you can find the latest call center definition file in the Web Services .war file. To get a copy of the file, navigate to the following URL:

```
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**.



- 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.

### Installed Packages

Help for this Page ?

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#).

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.



Installed Packages									
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects
<a href="#">Uninstall</a>	<a href="#">Genesys Gplus for Salesforce</a>	Genesys	1.3	g_gplus	06/08/2015 1:17 PM	<input type="checkbox"/>	0	0	0

Uninstalled Packages									
No uninstalled package data archives									

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.

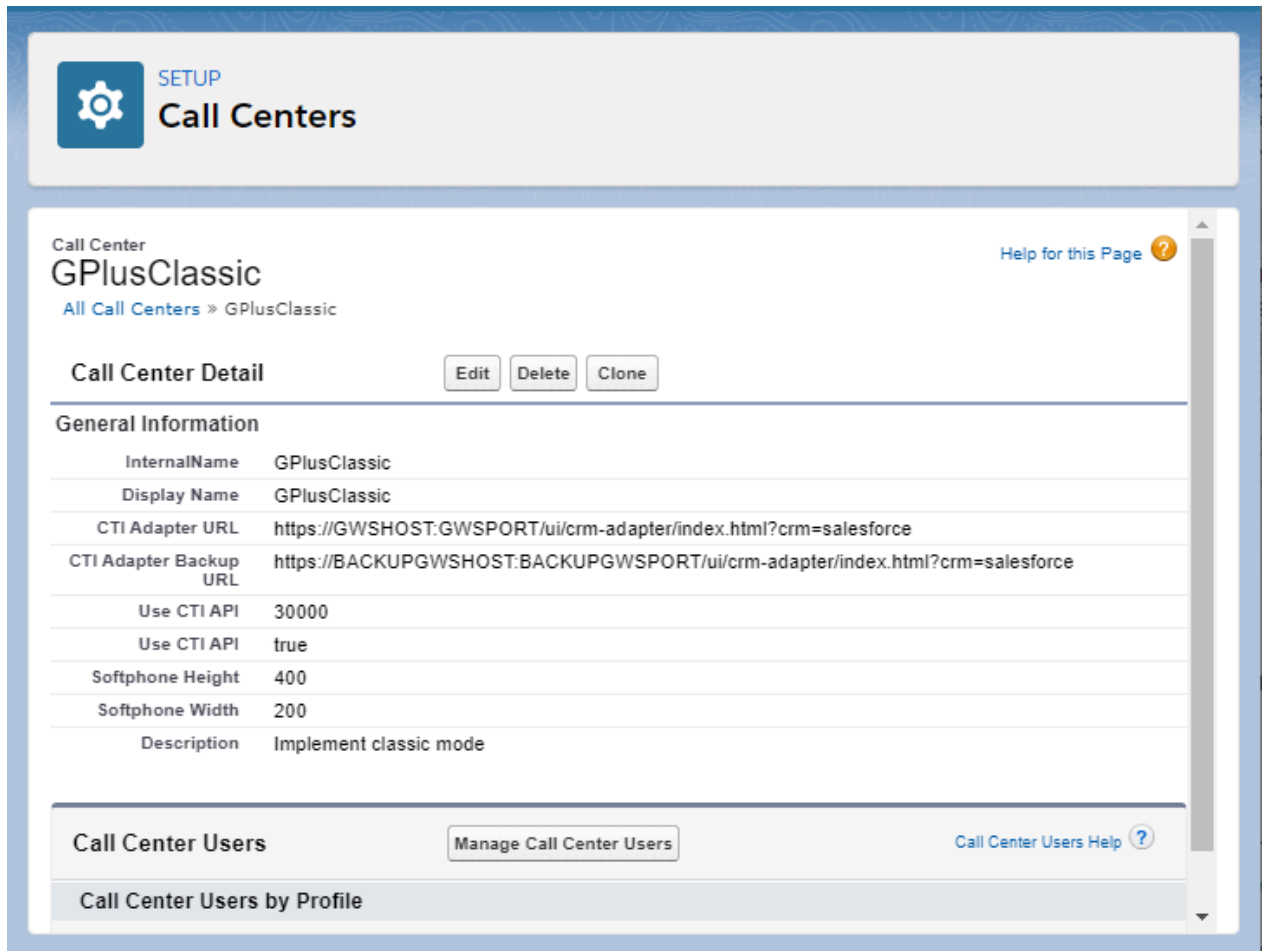
### Start

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.



The screenshot shows the Salesforce Setup interface for Call Centers. At the top, there's a 'SETUP' button and a 'Call Centers' header. Below this, the 'Call Center' section is titled 'GPlusClassic'. A breadcrumb trail shows 'All Call Centers > GPlusClassic'. There are three buttons: 'Edit', 'Delete', and 'Clone'. The 'Call Center Detail' section contains a table of configuration settings.

General Information	
InternalName	GPlusClassic
Display Name	GPlusClassic
CTI Adapter URL	https://GWSHOST:GWSPORT/ui/crm-adapter/index.html?crm=salesforce
CTI Adapter Backup URL	https://BACKUPGWSHOST:BACKUPGWSPORT/ui/crm-adapter/index.html?crm=salesforce
Use CTI API	30000
Use CTI API	true
Softphone Height	400
Softphone Width	200
Description	Implement classic mode

Below the table, there's a 'Call Center Users' section with a 'Manage Call Center Users' button and a 'Call Center Users Help' link. At the bottom, there's a section for 'Call Center Users by Profile'.

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

		<a href="#">Add More Users</a>	<a href="#">Remove Users</a>	
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**

- 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

[Help for this Page](#) ?

## 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--	▼		AND

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="button" value="Add to Call Center"/> <input type="button" value="Cancel"/>					
<input type="checkbox"/>	Full Name	Alias	Username	Role	Profile
<input type="checkbox"/>	<a href="#">Jackson, Helen</a>	<a href="#">hjackson</a>	<a href="#">hjackson@genesysmail.com</a>		<a href="#">Standard User</a>

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"/> <a href="#">Remove</a>	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

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

The screenshot shows the Salesforce Console interface. The top navigation bar includes the Salesforce logo, a search bar, and user information (Tom Mopa). The main content area is divided into two panes. The left pane shows a list of leads with columns for Name, Company, State/Province, Phone, Email, Lead Status, Owner Alias, and Created Date. The right pane is titled 'Genesys • Workspace' and contains a 'My Workspace' dashboard. The dashboard has tabs for 'My Channels', 'My Campaigns', 'My History', 'Dashboard', 'My Statistics', 'Contact Center Statistics', and 'SugarCRM'. The 'Dashboard' tab is selected. It features a 'My Reports' section with a 'Call Activity' gauge showing 0 Total and 0 Inbound calls. There is also a 'Contact Center' section for '2223\_SIP\_Switch' showing 'Current Max Wait Time' and 'Average Wait Time' both at 00:00. A 'Workspace' button is located in the bottom right corner of the interface.

The adapter in Salesforce Console.

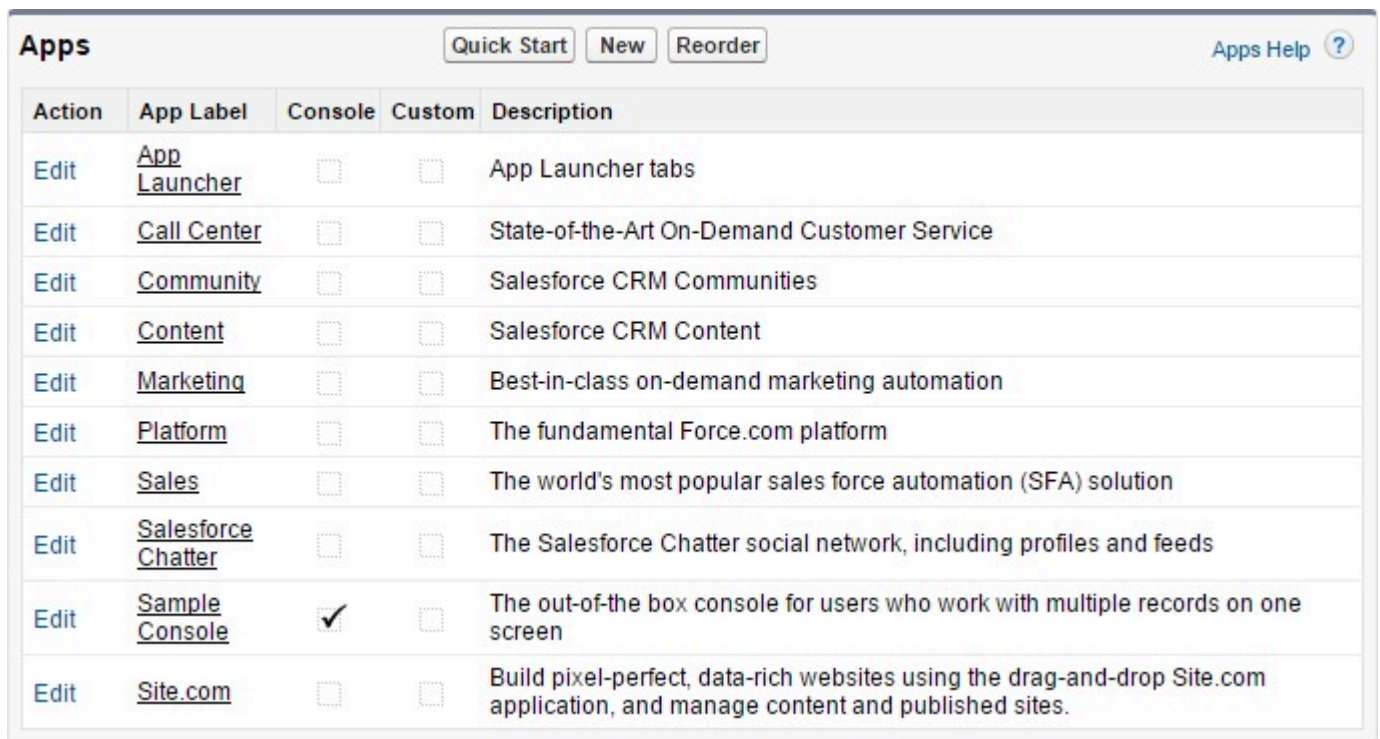
## End

## 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:



The screenshot shows the Salesforce 'Apps' management page. At the top, there are buttons for 'Quick Start', 'New', and 'Reorder', and a link for 'Apps Help'. Below these is a table with columns: Action, App Label, Console, Custom, and Description. The 'Sample Console' app is highlighted, and its 'Console' checkbox is checked.

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