



This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

Web Services and Applications

crm-adapter Section

crm-adapter Section

- click-to-dial.preprocessing-rules
- salesforce.activity-log.enabled-call-types
- salesforce.activity-log.enabled-chat-types
- salesforce.activity-log.enabled-openmedia-types
- salesforce.activity-log.field-mapping
- salesforce.activity-log.mode
- salesforce.activity-log.on-screenpop
- salesforce.activity-log.status
- salesforce.activity-log.ui-association
- salesforce.block-adapter-multitab
- salesforce.chat.include-transcript-in-desc
- salesforce.chat.transcript-custom-field-name
- salesforce.debug-notifications
- salesforce.email.include-body-in-desc
- salesforce.enable-click-to-dial
- salesforce.enable-in-focus-page-transfer
- salesforce.keep-session-alive
- salesforce.message-
- channel.name
- salesforce.new-record.field-mapping
- salesforce.notifications
- salesforce.run-apex.class
- salesforce.run-apex.events
- salesforce.run-apex.userdata-key-list
- salesforce.user-data.object-id-key
- salesforce.user-data.object-name-key
- salesforce.user-data.object-type-key
- screenpop.chat.on-invite
- screenpop.email.on-create
- screenpop.email.on-invite
- screenpop.enable-for-consult
- screenpop.enable-for-internal-calls
- screenpop.for-outbound
- screenpop.id-key-regex
- screenpop.include-ani-in-search
- screenpop.include-dnis-in-search
- screenpop.object-api-name
- screenpop.object-type
- screenpop.object-type-flow
- screenpop.object-type-list
- screenpop.object-type-new-record
- screenpop.object-type-object-home
- screenpop.object-type-search
- screenpop.object-type-url
- screenpop.on-ringing
- screenpop.openmedia.on-invite
- screenpop.preprocessing-rule
- screenpop.save-new-record-criterion
- screenpop.search-key-regex
- screenpop.transfer-object-key
- templates.salesforce.chat.subject
- templates.salesforce.email.subject
- templates.salesforce.inbound-voice.subject
- templates.salesforce.internal-voice.subject
- templates.salesforce.openmedia.subject
- templates.salesforce.outbound-voice.subject
- templates.salesforce.transfer-voice.subject
- templates.salesforce.<interaction type>.subject

Important

For information about how to use these options to configure Genesys Web Services functionality and behavior, refer to the *Web Services and Applications 9.0.0 Configuration Guide* and the *Gplus Adapter configuration information*.

click-to-dial.preprocessing-rules

Default Value: default

Valid Values: default, none, or a comma-separated list of pre-processing rule section names

Changes Take Effect: When the session is started or restarted.

Specifies the pre-processing rules to apply to the phone number before making a dial request. If the option is not defined, the default rule is applied. The possible values are:

- **default** — applies the default rules:
 - If the phone number is 10 digits, add +1.
 - If the phone number is 11 digits, add +.
 - If the phone is greater than 11 digits and doesn't start with 011, add 011.
- **none** — turns off pre-processing.
- **<pre-processing-rule-section-name(s)>** — name of the pre-processing rule section(s). Within a rule section, you **must** set the following key/value pairs:
 - **expression** — A regex that defines the condition to be matched.
 - **prefix** — The prefix to be added to the phone number if the expression is matched.
 - **description** — A short description of the rule.

Here's how the default rules are configured:

```
[crm-adapter]
click-to-dial.preprocessing-rules: preprocessing-rule-10-digit-US-numbers,
preprocessing-rule-11-digit-US-numbers, preprocessing-rule-international-numbers

[preprocessing-rule-10-digit-US-numbers]
expression: ^[0-9]{10}$
prefix: +1
description: "If it is 10 digits add +1"

[preprocessing-rule-11-digit-US-numbers]
expression: ^[0-9]{11}$
prefix: +
description: "If it is 11 digits, add +"

[preprocessing-rule-international-numbers]
expression: ^(?:011)[0-9]{8,}$
```

prefix: 011

description: "If it is greater than 11 digits and doesn't start with 011, add 011"

Note: Adapter runs each rule in sequence until it finds a match and adds the prefix. No further rules are executed.

salesforce.activity-log.enabled-call-types

Default Value: Inbound, Outbound, Internal, Consult

Valid Values: A comma-separated list of call types (Inbound, Outbound, Internal, Consult) or an empty value to disable all.

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies the call types Adapter should create activity history entries for in Salesforce.

salesforce.activity-log.enabled-chat-types

Default Value: Inbound

Valid Values: A comma-separated list of chat types (Inbound, Consult) or an empty value to disable all.

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies the chat or SMS types Adapter should create activity history entries for in Salesforce. For SMS, the Activity task is created only for an unassigned contact in the Workspace Agent Desktop Communication tab.

salesforce.activity-log.enabled-openmedia-types

Default Value: Inbound

Valid Values: Open media (workitem) types (Inbound) or leave empty to disable all activity creation.

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies the open media (workitem) types Adapter should create activity history entries for in Salesforce.

salesforce.activity-log.field-mapping

Default Value: No default value

Valid Values: The name of a configuration section that contains the mapping.

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies the name of the configuration section where the mapping is defined. In that section, each key must correspond to a UserData key Adapter should look for and each value must correspond to the name of the custom activity field in Salesforce. If this option is not defined or has a blank value,

no custom values are added when Adapter creates the activity history. Also, if a given key is not present in the UserData or does not have a value, Adapter doesn't include it in the activity creation request.

Here's an example of how to configure the mapping:

```
[crm-adapter]
salesforce.activity-log.field-mapping=my-field-mappings

[custom-field-mappings]
firstName=first_name__c
lastName=last_name__c
```

salesforce.activity-log.mode

Default Value: search_query

Valid Values: search_query, open_page

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.000.55

Specifies the Salesforce criterion to associate the Activity Log Task with when the interaction is completed.

- search_query (Salesforce Search): Gplus Adapter associates the Activity Log Task based on the Salesforce search result.
- open_page (Salesforce Open Record): Gplus associates the Activity Log Task with the active record that is open in Salesforce when the interaction is completed.

salesforce.activity-log.on-screenpop

Default Value: false

Valid Values: true, false

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies whether Adapter creates the activity in Salesforce on screen pop and modifies logged activity when interaction is marked done. Activity on screen pop is created for inbound, outbound, and internal calls. Depends on **screenpop.enable-for-internal-calls** being set to true and the value of **salesforce.activity-log.enabled-call-types** containing Inbound and Internal.

salesforce.activity-log.status

Default Value: Completed

Valid Values: Any string representing a status. Cannot contain the following character: &

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies the custom task status to be applied when an activity log is created by Adapter. You should first **create the status** in the Salesforce **Task Status Picklist**; if you do not, an activity log is created

with the custom status but the status is inactive and will not be displayed in the list of available task statuses.

salesforce.activity-log.ui-association

Default Value: false

Valid Values: true, false

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.000.55

Specifies whether Gplus Adapter displays the Activity Log Task Object Association table into the Gplus Adapter UI for Salesforce Lightning when the interaction is completed. Gplus Adapter stores opened Salesforce records in the Activity Log Task Object Association table. To associate an Activity Task, agents can select a record in the Gplus Adapter UI before the interaction is completed. Contact Genesys to enable this feature.

salesforce.block-adapter-multitab

Default Value: false

Valid Values: true, false

Changes Take Effect: When the session is started or restarted

Specifies that Gplus Adapter cannot work in more than one browser tab.

salesforce.chat.include-transcript-in-desc

Default Value: true

Valid Values: true, false

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies whether Adapter saves the chat transcript as part of the activity description in Salesforce.

salesforce.chat.transcript-custom-field-name

Default Value: No default value

Valid Values: Name of a custom field in Salesforce.

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies the name of a **custom activity field in Salesforce**. If set, Adapter saves the chat transcript to this field in Salesforce. **Note:** Salesforce Lightning Experience supports only 255 characters for Text fields. If you configure the Text fields to store the chat transcripts and set the length of characters as 255, only the first 255 characters of the chat transcript will be saved in the Activity History and the remaining transcript will be truncated. However, you can still view the **Details** and **Case Data** of the chat interaction in the **My History** tab in Agent Desktop. Whereas, if you configure the Text field's character length with a value less than 255, then the chat transcript will be truncated at that number

of characters in the Activity History.

salesforce.debug-notifications

Default Value: false

Valid Values: true, false

Changes Take Effect: When the session is started or restarted.

Specifies whether Gplus Adapter displays all notifications (positive and negative).

salesforce.email.include-body-in-desc

Default Value: false

Valid Values: true, false

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

When set to true, includes the text version of the email body in the **Email Content** field in the **Comments** block in Salesforce Activity History. The email body is saved only for inbound emails and outbound replies.

salesforce.enable-click-to-dial

Default Value: true

Valid Values: true, false

Changes Take Effect: When the session is started or restarted.

If this option is set to true, Gplus Adapter enables Salesforce click-to-dial, or, if set to false, Gplus Adapter does not accept click-to-dial requests, regardless of whether or not click-to-dial is enabled in Salesforce.

salesforce.enable-in-focus-page-transfer

Default Value: false

Valid Values: true, false

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies whether to update the call data with the ID of the object the agent is looking at in Salesforce when performing a voice or chat conference or transfer. If set to true, the agent receiving the voice or chat conference or transfer gets a screen pop for the most relevant object.

salesforce.keep-session-alive

Default Value: false

Valid Values: true, false

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies whether to prevent Adapter from logging out of Salesforce when there is no activity in Salesforce beyond a configurable time period. If set to `true`, Adapter refreshes the Salesforce session at short intervals and keeps Adapter-Salesforce session alive.

salesforce.message-channel.name

Default Value:

Valid Values: A string that contains the name of a message channel in Salesforce in the following format: `NameSpacePrefix__ChannelName__c` or `ChannelName__c`.

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.000.57

Specifies the name of a message channel in Salesforce for the Service Client API.

salesforce.new-record.field-mapping

Default Value:

Valid Values: The name of a configuration section that contains the mapping of a new record custom field mapping.

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.000.57

Related Options: `screenpop.save-new-record-criterion`, `screenpop.object-api-name`

Specifies the name of the configuration section where the mapping is defined. In the section, each key must correspond to an interaction `UserData` key and each value must correspond to the name of the Salesforce standard or custom object field.

Here is a sample `UserData` key:

```
[crm-adapter]
salesforce.new-record.field-mapping=new-record-mappings
[new-record-mappings]
firstName=first_name__c
lastName=last_name__c
```

salesforce.notifications

Default Value: false

Valid Values: true, false

Changes Take Effect: When the session is started or restarted.

Specifies whether Gplus Adapter displays notifications (positive only).

salesforce.run-apex.class

Default Value: No default value

Valid Values: Apex Class Name

Changes Take Effect:

Dependencies: salesforce.run-apex.events

Introduced: 9.0.000.51

Specifies the name of the Salesforce Apex Class that is to be executed based on the events specified by the salesforce.run-apex.events option.

salesforce.run-apex.events

Default Value: No default value

Valid Values: RINGING, DIALING, ESTABLISHED, RELEASED, INVITED, ACCEPTED, CREATED, REMOVED

Changes Take Effect:

Dependencies: salesforce.run-apex.class

Introduced: 9.0.000.51

Modified: 9.0.000.94

Specifies the list of one or more Genesys interaction events that trigger Salesforce Apex Code specified by the salesforce.run-apex.class option to run.

salesforce.run-apex.userdata-key-list

Default Value:

Valid Values: Comma-separated list of fields in userData that will be delivered to Salesforce Apex parameter eventData.

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.000.63

Specifies a comma-separated list of the userData key names to be delivered to Salesforce Apex. For example: userDataKeyName1, userDataKeyName2, userDataKeyName3.

salesforce.user-data.object-id-key

Default Value: No default value

Valid Values: A valid user key name to store the Salesforce object id. For example: sf_object_key

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies the key Adapter uses when saving the ID of the focused Salesforce object to attached data.

salesforce.user-data.object-name-key

Default Value: No default value

Valid Values: A valid user key name to store the Salesforce object name. For example: `sf_object_name`

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies the key Adapter uses when saving the name of the focused Salesforce object to attached data.

salesforce.user-data.object-type-key

Default Value: No default value

Valid Values: A valid user key name to store the Salesforce object type name. For example: `sf_object_type`

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies the key Adapter uses when saving the type of the focused Salesforce object to attached data.

screenpop.chat.on-invite

Default Value: false

Valid Values: true, false

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies whether Adapter initiates a screen pop in Salesforce immediately after displaying the chat or SMS invite notification. If the option is not set or false, Adapter initiates a screen pop only when the agent accepts the chat or SMS invite. For SMS, the screen pop appears only for an unassigned contact, and if the contact is already assigned to the agent in the Workspace Agent Desktop **Communication** tab, no screen-pop is displayed.

screenpop.email.on-create

Default Value: false

Valid Values: true, false

Changes Take Effect:

Introduced: 9.0.000.54

Specifies whether Adapter initiates a screen pop in Salesforce immediately after creating an email. If the option value is not set or is set to false, Adapter does not initiate a screen pop when a new outgoing or reply email is created.

screenpop.email.on-invite

Default Value: false

Valid Values: true, false

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies whether Adapter initiates a screen pop in Salesforce immediately after displaying the email invite notification. If the option is not set or false, Adapter initiates a screen pop only when the agent accepts the email invite.

screenpop.enable-for-consult

Default Value: false

Valid Values: true, false

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies whether Adapter initiates screen pops for consultation calls regardless of **screenpop.enable-for-internal-calls** option configuration.

screenpop.enable-for-internal-calls

Default Value: true

Valid Values: true, false

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies whether Adapter initiates screen pops for internal calls.

screenpop.for-outbound

Default Value:

Valid Values: established, dialing

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.000.xx

Related Options: screenpop.id-key-regex, screenpop.include-ani-in-search, screenpop.search-key-regex, screenpop.save-new-record-criterion

Specifies whether Gplus Adapter initiates screen pops in Salesforce for outbound calls.

- If no value is specified, Gplus Adapter does not screen pop for outbound calls.
- Established: Gplus Adapter initiates a screen pop when the call is established.
- Dialing: Gplus Adapter initiates a screen pop on dialing.

screenpop.id-key-regex

Default Value: No default value

Valid Values: A regular expression that matches a UserData key.

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies a regular expression pattern used to match a UserData key. This key's value should contain the ID of an object to screen pop in Salesforce. As with the existing screen pop behavior using the "id_" prefix, if multiple matching keys are present, Adapter only uses the first one. If this option isn't defined, Adapter uses the existing "id_" prefix logic.

screenpop.include-ani-in-search

Default Value: true

Valid Values: true, false

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies whether the ANI is used in the screen pop search.

screenpop.include-dnis-in-search

Default Value: false

Valid Values: true, false

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies whether the pre-processed DNIS is used in the screen pop search.

screenpop.object-api-name

Default Value:

Valid Values: The name of a Salesforce custom object API

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.000.57

Related Options: screenpop.save-new-record-criterion, salesforce.new-record.field-mapping

Specifies the Salesforce custom object API name. To find the API name, go to Salesforce Setup - Object Manager - Custom Object - Details - API Name.

screenpop.object-type

Default Value: SUBJECT

Valid Values: SUBJECT, FLOW, URL, OBJECTHOME, LIST, SEARCH, NEW_RECORD_MODAL

Changes Take Effect: Immediately

Introduced: 9.0.0

Related Options: screenpop.object-type-flow, screenpop.object-type-url, screenpop.object-type-object-home, screenpop.object-type-list, screenpop.object-type-search, screenpop.object-type-new-record

Specifies object type to screen pop in Salesforce. The following options enable you to configure the supported object types:

- **screenpop.object-type-flow**
- **screenpop.object-type-url**
- **screenpop.object-type-object-home**
- **screenpop.object-type-list**
- **screenpop.object-type-search**
- **screenpop.object-type-new-record**

screenpop.object-type-flow

Default Value: No default value

Valid Values: A string that contains the name of the custom section that you have defined to contain the Flow to be executed during the ringing or established phase.

Changes Take Effect: After the next platform configuration refresh interval.

Introduced: 9.0.0

Related Options: screenpop.object-type

Specifies the section name where the **flowDevName** and **flowArgs** options are configured. Options must contain a valid flow name and flow arguments in JSON format. Values may also be user data keys in the following format: '\$key_name\$'.

- **Example 1:**

- Section name: custom.section.flow
- Key: flowDevName
- Value: 'Test_flow'
- Key: flowArgs
- Value: ' [{ "name": "text", "type": "String", "value": "Test"}, { "name": "number", "type": "Number", "value": 5 }] '

- **Example 2:**

- Section name: custom.section.flow
- Key: flowDevName
- Value: '\$attach_data_flow_name\$'
where attach_data_flow_name is the name of the user data attribute containing the name of the Flow.
- Key: flowArgs
- Value: '\$attach_data_flow_param\$'
where attach_data_flow_param is the name of the user data attribute containing the Flow

parameters.

screenpop.object-type-list

Default Value: No default value

Valid Values: A string that contains the name of the custom section that you have defined to contain the object list.

Changes Take Effect: After the next platform configuration refresh interval.

Introduced: 9.0.0

Related Options: screenpop.object-type

Specifies the section name where the 'scope' and 'listViewId' options are configured. These options must contain a valid object name like 'Contact' and a List ID like '00B3m000008e3AwEAI', or user data keys in the following format: '\$key_name\$'.

- **Example 1:**

- Section name: custom.section.list
- key: listViewId
- value: 00B3m000008e3AwEAI
- key: scope
- value: "Contact"

- **Example 2:**

- Section name: custom.section.list
- key: listViewId
- value: '\$attach_data_list_id\$'
where attach_data_key is the name of the user data attribute containing the valid ID of a list.
- key: scope
- value: '\$attach_data_list_scope\$'
where attach_data_list_scope is the name of the user data attribute containing the valid object name of a list item.

screenpop.object-type-new-record

Default Value: No default value

Valid Values: A string that contains the name of the custom section that you have defined to contain the new object type record name.

Changes Take Effect: After the next platform configuration refresh interval.

Introduced: 9.0.0

Related Options: screenpop.object-type

Specifies the section name where the 'entityName' option is configured. This option must contain a valid object name like 'Account', 'Case', 'Contact', 'Lead' or a user data key in the following format: '\$key_name\$'.

- **Example 1:**

- Section name: custom.section.newrecord
- Key: entityName
- Value: "Contact"

- **Example 2:**

- Section name: custom.section.newrecord
- Key: entityName
- Value: '\$attach_data_entityname\$'
where attach_data_entityname is the name of the user data attribute containing the valid object name.

screenpop.object-type-object-home

Default Value: No default value

Valid Values: A string that contains the name of the custom section you have defined to contain the Object Home.

Changes Take Effect: After the next platform configuration refresh interval.

Introduced: 9.0.0

Related Options: screenpop.object-type

Specifies section name where the 'scope' option is configured. The 'scope' option must contain a valid object name like 'Contact' or user data key in the following format: '\$key_name\$'.

- **Example 1:**

- Section name: custom.section.objecthome
- key: scope
- value: "Contact"

- **Example 2:**

- Section name: custom.section.objecthome
- key: scope
- value: '\$attach_data_key\$'
where attach_data_key is the name of the user data attribute containing the valid object name.

screenpop.object-type-search

Default Value: No default value

Valid Values: A string that contains the name of the custom section that you have defined to contain the default search string. The search string must be at least 3 characters.

Changes Take Effect: After the next platform configuration refresh interval.

Introduced: 9.0.0

Related Options: screenpop.object-type

Specifies the section name where the 'searchString' option is configured. This option must contain a valid string at least 3 characters in length or a user data key in the following format: '\$key_name\$'.

- **Example 1:**

- Section name: custom.section.search
- Key: searchString
- Value: "abc"

- **Example 2:**

- Section name: custom.section.search
- Key: searchString
- Value: '\$attach_data_search\$'
where attach_data_search is the name of the user data attribute containing a valid string of at least 3 characters.

screenpop.object-type-url

Default Value: No default value

Valid Values: A string that contains the name of the custom section you have defined to contain the URL.

Changes Take Effect: After the next platform configuration refresh interval.

Specifies the URL section name for the screen pop object type. The custom section must contain the key "url". This key must contain a valid URL or an '\$attach_data_key\$' name.

- **Example 1:**

- Section name: custom.section.url
- key: url
- value: "https://www.genesys.com"

- **Example 2:**

- Section name: custom.section.url
- key: url
- value: '\$attach_data_key\$'
where attach_data_key is the name of the user data attribute containing the URL address of the website to pop.

screenpop.on-ringing

Default Value: false

Valid Values: true, false

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies whether Adapter initiates a screen pop in Salesforce when the call is ringing. If not set or if set to false, Adapter initiates a screen pop when the call is established.

screenpop.openmedia.on-invite

Default Value: false

Valid Values: true, false

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies whether Adapter initiates a screen pop in Salesforce immediately after displaying the open media invite notification. If the option is not set or false, Adapter initiates a screen pop only when the agent accepts the open media invite. This option supports the open media items configured in the [openmedia.workitem-channels](#) option.

screenpop.preprocessing-rule

Default Value: default

Valid Values: default, none, or a pre-processing rule section name.

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies the pre-processing rule to apply to the Automatic Number Identification (ANI) before showing the screen pop. If the option is not defined, the default rule is applied. The possible values are:

- default — applies the default rule, which removes +1 from the beginning of the ANI.
- none — turns off pre-processing.
- <pre-processing-rule-section-name> — name of the pre-processing rule section. Within this rule section, you **must** set the following key/value pairs:
 - expression — A regex that defines the condition to be matched.
 - replacement — The string to replace the matched substring. If you set this value to empty, this removes the matched section.
 - description — A short description of the rule.

Here's how the default rule would be configured:

```
[crm-adapter]
screenpop.preprocessing-rule: preprocessing-rule-remove-prefix

[preprocessing-rule-remove-prefix]
expression: ^\\+1
replacement:
description: "Remove +1 from the beginning of the number"
```

screenpop.save-new-record-criterion

Default Value:

Valid Values: no_matching_record, always

Changes Take Effect: When the session is started or restarted.

Dependencies: screenpop.object-api-name, salesforce.new-record.field-mapping

Introduced: 9.0.000.57

Specifies whether Gplus Adapter creates new Salesforce record on screen pop.

- If left blank, no new Salesforce record is created.
- no_matching_record: A new Salesforce record is created if Salesforce search returns no matching record.
- always: A new Salesforce record is created for every screen pop.

screenpop.search-key-regex

Default Value: cti_

Valid Values: A regular expression that matches one or more UserData keys.

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies a regular expression pattern used to match one or more UserData keys. The values for these keys are used to build the search and screen pop expression in Salesforce. If this option is not defined, Adapter uses the existing "cti_" prefix logic.

screenpop.transfer-object-key

Default Value: id_transfer_object

Valid Values: A valid key

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies the custom UserData key Adapter should use for the object ID of the focused page in Salesforce.

templates.salesforce.chat.subject

Default Value: false

Valid Values: A string with custom template variables wrapped in { and }

Changes Take Effect: Immediately

Introduced: 9.0.000.95

Specifies the custom template the adapter should use when creating the subject field in a Salesforce activity.

templates.salesforce.email.subject

Default Value: false

Valid Values: A string with custom template variables wrapped in { and }

Changes Take Effect: Immediately

Introduced: 9.0.000.95

Specifies the custom template the adapter should use when creating the subject field in a Salesforce activity.

templates.salesforce.inbound-voice.subject

Default Value: false

Valid Values: A string with custom template variables wrapped in { and }

Changes Take Effect: Immediately

Introduced: 9.0.000.95

Specifies the custom template the adapter should use when creating the subject field in a Salesforce activity.

templates.salesforce.internal-voice.subject

Default Value: false

Valid Values: A string with custom template variables wrapped in { and }

Changes Take Effect: Immediately

Introduced: 9.0.000.95

Specifies the custom template the adapter should use when creating the subject field in a Salesforce activity.

templates.salesforce.openmedia.subject

Default Value: false

Valid Values: A string with custom template variables wrapped in { and }

Changes Take Effect: Immediately

Introduced: 9.0.000.95

Specifies the custom template the adapter should use when creating the subject field in a Salesforce activity.

templates.salesforce.outbound-voice.subject

Default Value: false

Valid Values: A string with custom template variables wrapped in { and }

Changes Take Effect: Immediately

Introduced: 9.0.000.95

Specifies the custom template the adapter should use when creating the subject field in a Salesforce activity.

templates.salesforce.transfer-voice.subject

Default Value: false

Valid Values: A string with custom template variables wrapped in { and }

Changes Take Effect: Immediately

Introduced: 9.0.000.95

Specifies the custom template the adapter should use when creating the subject field in a Salesforce activity.

templates.salesforce.<interaction type>.subject

Default Value: {interaction.callType} call to {interaction.dnis}

Valid Values: A string with custom template variables wrapped in "{" and "}"

Changes Take Effect: When the session is started or restarted.

Introduced: 9.0.0

Specifies the custom template Adapter should use when creating the subject field in a Salesforce activity. You can specify the value for <interaction type> argument in the option name. <interaction type> is either inbound-voice, outbound-voice, transfer-voice, chat, or email. Set the value of this option to a string that contains custom template variables wrapped in "{" and "}". For details, see [Custom templates](#).