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Genesys Engage cloud Administrator's Guide

Enabling Lightning Experience (Adapter v8)

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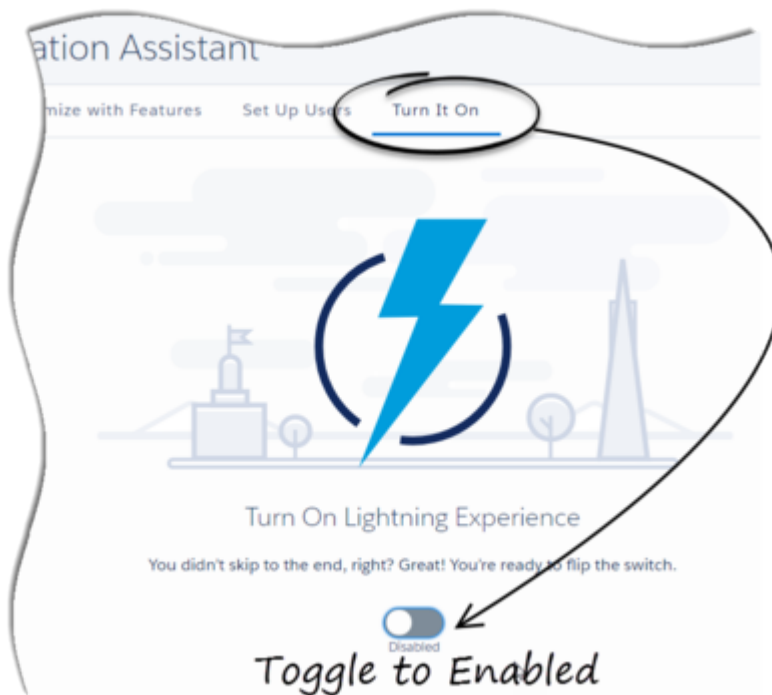
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Enabling Lightning Experience (Adapter v8)

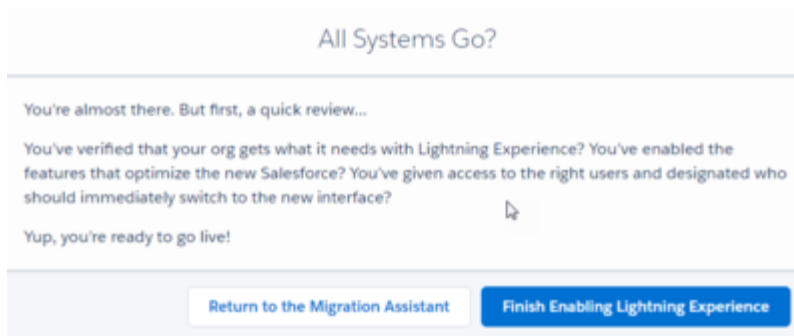
If you're using the Agent Desktop (v8) option, complete the procedures on this page to enable, set up, and access Lightning in your Salesforce environment.

Enabling Lightning in Salesforce

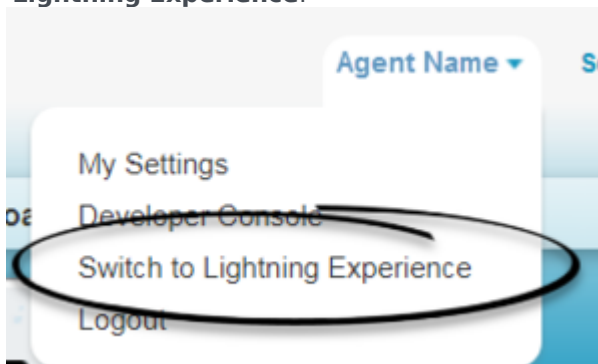
1. Log into the Salesforce environment.
2. From the **Setup** page, select **Lightning Experience** in the left-hand navigation bar. **Note:** If in Salesforce Classic mode, click the **Setup** menu and then the **Get Started** button found in the left-hand navigation bar.
3. In the **Lightning Experience** window, select **Turn It On**.
4. Move the toggle to the **Enabled** state.



5. A modal will pop up; click the **Finish Enabling Lightning Experience** button in the modal.

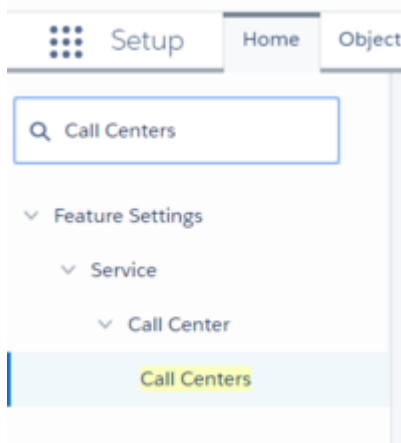


6. In the dropdown labeled with the agent's name at the top of the Salesforce classic view, click **Switch to Lightning Experience**.



Setting Up The Adapter In Lightning

1. Download the **lightning-callcenter.xml** file on your computer by right-clicking the link [here](#) and selecting the **Save link as...** option on the popup menu.
2. Go to the **Setup** page by clicking on the gear icon in the top right corner and clicking **Setup**.
3. Using the quick find field, search for and access the **Call Centers** settings page.



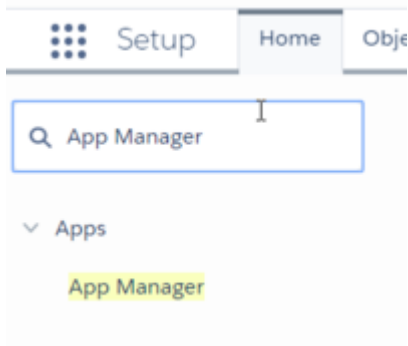
4. Click **Import**.

5. Click **Choose File**.
6. Select the **lightning-callcenter.xml** file downloaded on your computer. If you have not already downloaded the file, right-click the link [here](#) and select the **Save link as...** option to download.
7. Click **Import**.
8. From **All Call Centers** list, click the call center you just imported. For example, **GPlusLightning**.
9. Click **Edit**.
10. In the **CTI Adapter URL** field, replace 'GWSHOST' and 'GWSPORT' with the host and port details of the adapter in your environment. For example, an updated URL will look like this:
`https://bec135-gws.live.genesys.com/ui/crm-workspace/index.html?crm=lightning`
Note: If you are deploying the adapter with Single-Sign-On (SSO) capability, ensure that you add the `&authType=saml` parameter at the end of the CTI Adapter URL. For example, an updated URL with SSO capability will look like this: `https://bec135-gws.live.genesys.com/ui/crm-workspace/index.html?crm=lightning&authType=saml`
11. Click **Save**.
12. Click **Manage Call Center Users**.
13. Click **Add More Users**.
14. Search the interface to find the users you want to add to the Lightning adapter.

Important

A user cannot be added to both the Lightning and non-Lightning adapters

15. Select the users you want to add and click **Add to Call Center**.
16. Using the quick find field, access the **App Manager** settings page.



17. In the apps list, click the **Show more actions** drop down on the far right side of the adapter app you wish to use.
Note: If you do not see any apps in the list, you can create one by clicking **New Lightning App**.
18. Click **Edit**.
19. Click **Utility Bar**.
20. From the Utility Bar window, click **Add** and select "Open CTI Softphone".

21. Change the **Label** field to "Workspace".
22. Click **Done**.

Accessing the Adapter

1. In the top-left corner, click the **App Launcher** icon:



2. Select the app that you created when setting up the adapter.
3. Click **Workspace** from the bar at the bottom-left to open the adapter.
4. Log in to the Adapter.