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Genesys Engage cloud Administrator's Guide

Installing and Configuring Agent Desktop (v8) with Salesforce Console

Installing and Configuring Agent Desktop (v8) with Salesforce Console

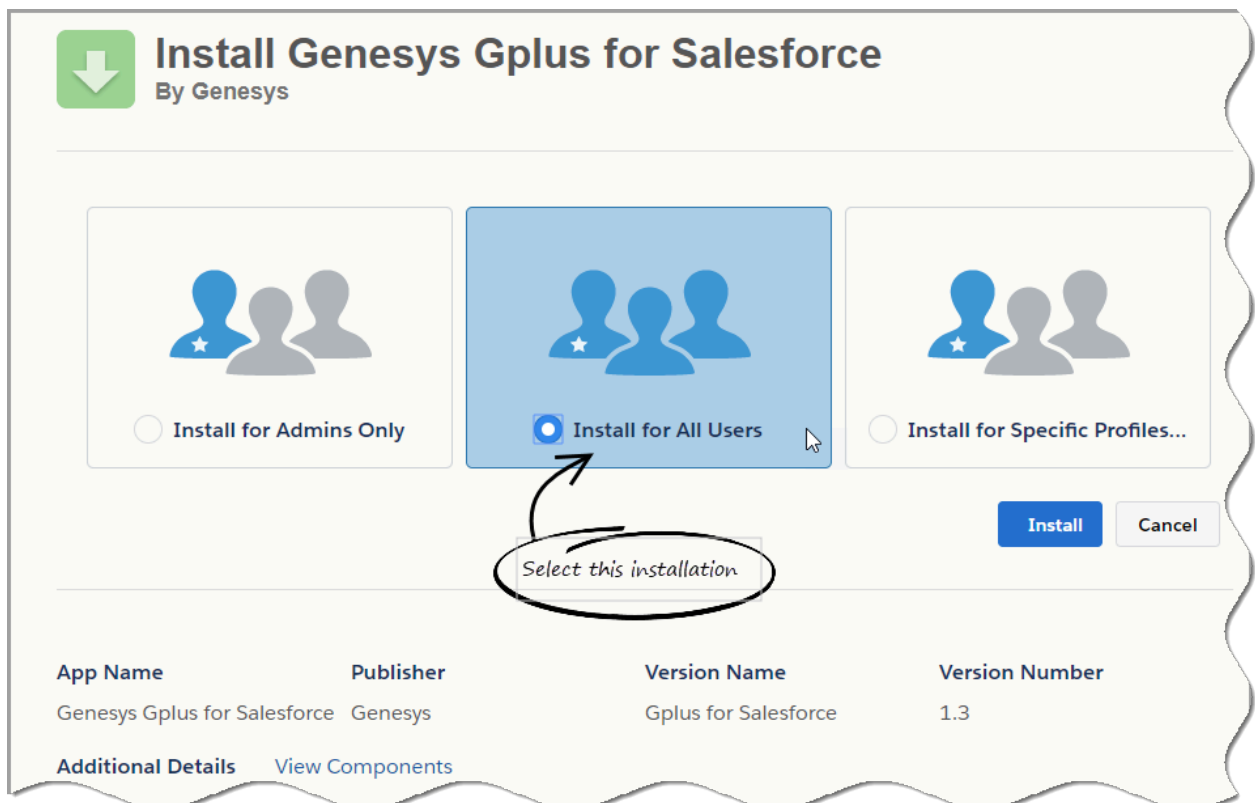
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Complete the procedures on this page to install and configure Agent Desktop (v8) in Salesforce Console.

Installing Agent Desktop in Salesforce

1. Open the following URL to install the latest Genesys Gplus Adapter (v8) for Salesforce package (this package is used for both the Agent Desktop and the Gplus Adapter) in Salesforce:
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04to00000000C3VD>
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 Agent Desktop to specific profiles, then you can choose **Install for Specific Profiles ...**. Click **Install**.



3. When you see the "Installation Complete!" message, click **Done**.

Install Genesys Gplus Adapter for Salesforce



By Genesys



Installation Complete!

Done

App Name	Publisher	Version Name	Version Number
Genesys Gplus Adapter for Salesforce	Genesys	Gplus for Salesforce	1.3

Description

Genesys Gplus Adapter for Salesforce integrated directly within Salesforce CRM, the Gplus Adapter provides Salesforce users with a unified desktop to manage both customer information and interaction controls.

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
Uninstall	Genesys Gplus for Salesforce	Genesys	1.3	g_gplus	06/08/2015 1:17 PM		0	0	0

Uninstalled Packages

No uninstalled package data archives

Configuring Salesforce for Agent Desktop

Complete this procedure to define your call center in Salesforce. The call center was created when you installed the Gplus Adapter for Salesforce package as part of [Installing Agent Desktop in Salesforce](#).

Warning

If no CRM is specified, screen pop and other integration features will be inactive.

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://''GWS_HOST:GWS_PORT''/ui/crm-workspace/index.html
```

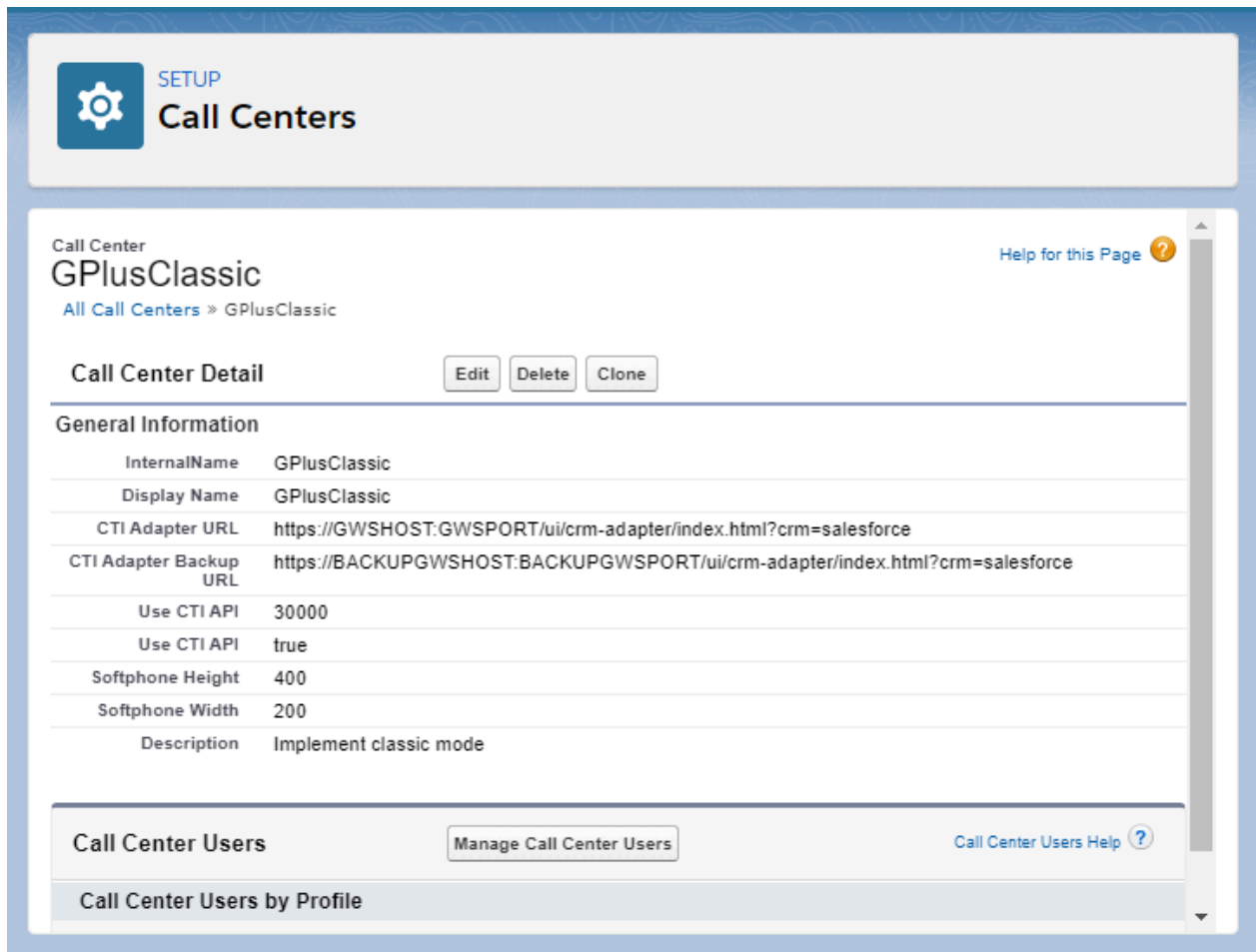
You'll need to change *GWS_HOST:GWS_PORT* to the correct host and port provided by Genesys. For example:

```
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 that Agent Desktop displays at an adequate size by default. You should leave the other options at their default values so Agent Desktop works correctly in Salesforce.



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**

Add More Users Remove Users				
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 Agent Desktop 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

[Find](#)

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

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"/>	Remove	Jackson, Helen	hjackson	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 Agent Desktop in Salesforce Console, click the **Workspace** button in the bottom right corner.

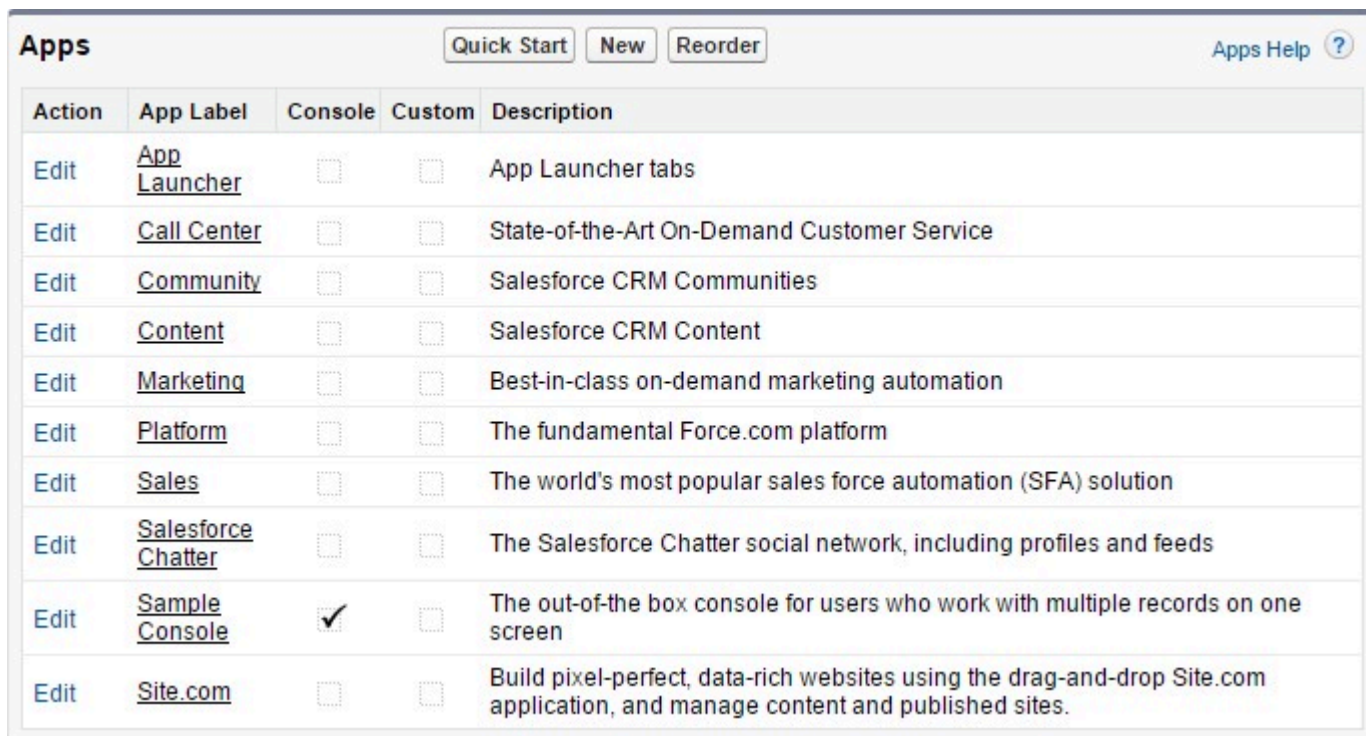
The screenshot shows the Salesforce Console interface with the Genesys Workspace overlay. The console displays a list of leads on the left and a dashboard with call activity and contact center statistics on the right. The Genesys Workspace overlay is positioned in the center-right, showing a search bar and various tabs like My Channels, My Campaigns, My History, Dashboard, My Statistics, Contact Center Statistics, and SugarCRM. The dashboard includes a 'Call Activity' section with a donut chart showing 0 total calls and 0 inbound calls, and a 'Contact Center' section showing 0 waiting calls and 00:00 current max wait time and average wait time.

Agent Desktop in Salesforce Console.

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 Agent Desktop in Salesforce Console in a separate browser window.

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:



Action	App Label	Console	Custom	Description
Edit	App Launcher	<input type="checkbox"/>	<input type="checkbox"/>	App Launcher tabs
Edit	Call Center	<input type="checkbox"/>	<input type="checkbox"/>	State-of-the-Art On-Demand Customer Service
Edit	Community	<input type="checkbox"/>	<input type="checkbox"/>	Salesforce CRM Communities
Edit	Content	<input type="checkbox"/>	<input type="checkbox"/>	Salesforce CRM Content
Edit	Marketing	<input type="checkbox"/>	<input type="checkbox"/>	Best-in-class on-demand marketing automation
Edit	Platform	<input type="checkbox"/>	<input type="checkbox"/>	The fundamental Force.com platform
Edit	Sales	<input type="checkbox"/>	<input type="checkbox"/>	The world's most popular sales force automation (SFA) solution
Edit	Salesforce Chatter	<input type="checkbox"/>	<input type="checkbox"/>	The Salesforce Chatter social network, including profiles and feeds
Edit	Sample Console	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The out-of-the box console for users who work with multiple records on one screen
Edit	Site.com	<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 provided by Genesys in Step 4 of [Configuring Salesforce for Agent Desktop](#). For example: 198.51.100.23:8090
3. Click **Save**.

Configuring Screen Pops in Salesforce

When an agent receives an external call, Agent Desktop 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 Agent Desktop:

- Agent Desktop ignores the SoftPhone Layout settings that control call-related fields. Instead, the Agent

Desktop gets this information from Toast and Case Data configured in your 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.