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Genesys Engage cloud Administrator's Guide

Installing and Uninstalling

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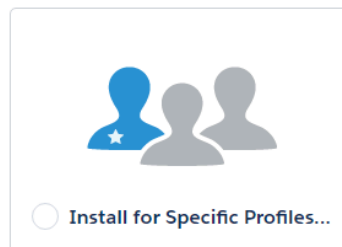
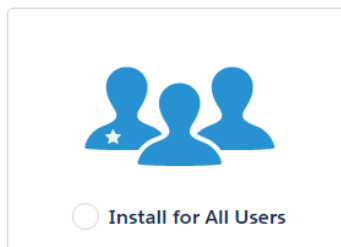
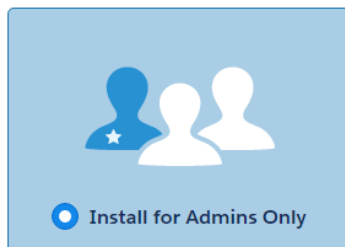
Installing and Uninstalling

How to install the Engage SFDC Adapter for Outbound

Install Genesys Outbound Adaptor By Tekomics



This app is password protected.



Install

Cancel



Install Genesys Outbound Adaptor

By Tekomics



Installation Complete!

Done

Installing the Engage SalesforceIntegration package in your Salesforce environment is easy. With just a few clicks the adapter is ready to use. Once you've logged into salesforce.com with your user name and password, simply click the following link to begin the installation:

Genesys Outbound Adapter (password is "Genesys1")

Choose your security level to begin the download. As you follow the prompts at the bottom of the page, you will be asked to approve third-party access in order to complete the installation. Once the package has been installed successfully, you'll see the **Installation Complete** message displayed. Now you just need to verify the configuration settings are installed and that there is a remote site record. These next sections will help you with those tasks.

How to verify the configuration settings are installed

The screenshot shows the Salesforce 'Custom Settings' page. On the left sidebar, under 'App Setup' > 'Develop', 'Custom Settings' is highlighted with a red circle. A red arrow points from this circle to the 'Engage Connection' record in the table below. The table has columns: Action, Label, Visibility, Settings Type, and Namespace Prefix. The 'Engage Connection' record is listed with 'Protected' visibility and 'List' settings type.

Action	Label ↑	Visibility	Settings Type	Namespace Prefix
Edit Del Manage	Engage Connection	Protected	List	

To check that your configuration settings were installed properly, navigate to **Custom Settings** found under **Develop** in the **Setup** area. Here you should see the **Engage Connection** record which stores the configuration settings for Engage.

One more step and you're done. Next, verify that there is a remote site record created.

How to verify a remote site has been created

The screenshot displays the Salesforce Setup interface. On the left, the 'Administration Setup' sidebar is visible, with 'Security Controls' expanded and 'Remote Site Settings' highlighted. The main content area shows the 'All Remote Sites' page. Below the header, a message states: 'Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.' A 'View: All Remote Sites' dropdown and a 'Create New View' link are present. A table lists existing remote sites, with columns for Action, Remote Site Name, Namespace Prefix, Remote Site URL, Active status, Created By, and Created Date. A 'New Remote Site' button is circled in the top right of the table. An arrow points from this button to the 'Remote Site Edit' dialog box shown in the foreground. The dialog box contains fields for Remote Site Name, Remote Site URL, a checkbox for 'Disable Protocol Security', a text area for 'Description', and an 'Active' checkbox. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By	Created Date
Edit Del	ApexDevNet	-	http://www.apexdevnet.com	✓	Do, Kimlan	1/15/2016 8:43 AM
Edit Del	GenesysEngageProd1	-	https://service1.soundbite.com	✓	Manager, Engage	1/18/2016 9:04 AM
Edit Del	GenesysEngageProd2	-	https://service2.soundbite.com	✓	Manager, Engage	1/18/2016 9:04 AM
Edit Del	GenesysEngageProd3	-	https://service3.soundbite.com	✓	Manager, Engage	1/18/2016 9:04 AM
Edit Del	GenesysEngageProd4	-	https://service4.soundbite.com	✓	Manager, Engage	1/18/2016 9:04 AM
Edit Del	GenesysEngageProd5	-	https://service5.soundbite.com	✓	Manager, Engage	1/18/2016 9:04 AM
Edit Del	GenesysEngageProd6	-	https://service6.soundbite.com	✓	Manager, Engage	1/18/2016 9:04 AM
Edit Del	GenesysEngageProd7	-	https://service7.soundbite.com	✓	Manager, Engage	1/18/2016 9:04 AM
Edit Del	GenesysEngageProd8	-	https://service8.soundbite.com	✓	Manager, Engage	1/18/2016 9:04 AM
Edit Del	GenesysEngageUAT	-	https://uat1.soundbite.com	✓	Manager, Engage	1/18/2016 9:04 AM

To check that there is a remote site created for Engage, you'll need to navigate to the **Remote Site Settings** option, found under **Security Controls** in the **Setup** area. Click on the **New Remote Site** button, add in your remote site details in the new window that opens and **Save** your changes.

Congratulations! Now that you've completed all the above steps, you're ready get started with your Engage SFDC Adapter for Outbound!

Uninstalling

The screenshot shows the Salesforce 'Installed Packages' page. The left sidebar contains the 'Setup' menu with 'Installed Packages' highlighted. The main content area displays a table of installed packages. The 'EngageSFDC Integration' package is highlighted. Below the table, the 'Uninstall' button is circled. A callout box shows the 'Custom Object Data' options, where the 'Uninstall' button is also circled.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed License
Uninstall	EngageSFDC Integration	Tekomics LLC.	1.5		N/A	N/A
Uninstall	Genesys Gplus for Salesforce	Genesys	1.3	g_gplus	Free	N/A
Uninstall	Salesforce for Google AdWords	SFGA Build	1.2	SFGA	Active	Unlimited
Uninstall	Work.com Perform (DEPRECATED)	salesforce.com	1.2		N/A	N/A

Uninstall Options:

Custom Object Data

Custom Object: Engage Connection

Records: 0

☐ Save a copy of this package's data for 48 hours after uninstall
☐ Do not save a copy of this package's data after uninstall
☒ Yes, I want to uninstall this package and permanently delete all associated components

Uninstall

Should you wish to uninstall the adapter, you only need navigate to your **Installed Packages**, found under **Deploy** in your **Setup** menu. Simply click on **Uninstall** next to the adapter name and scroll to the bottom of the page where you'll find the removal options. Choose whether or not you wish save a copy of the data for 48 hours after the uninstall, check the check box next to the removal agreement and then click **Uninstall**. You're automatically brought back to the Installed Packages window where you'll now see the adapter name under the Uninstalled Packages section.