GENESYS™

Gplus Adapter for ServiceNow Agent's Guide

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Get started with Gplus Adapter

Contents

Here is an introduction to the Gplus Adapter for ServiceNow.

The Gplus Adapter for ServiceNow provides integrated management of communication channels within the ServiceNow CRM.
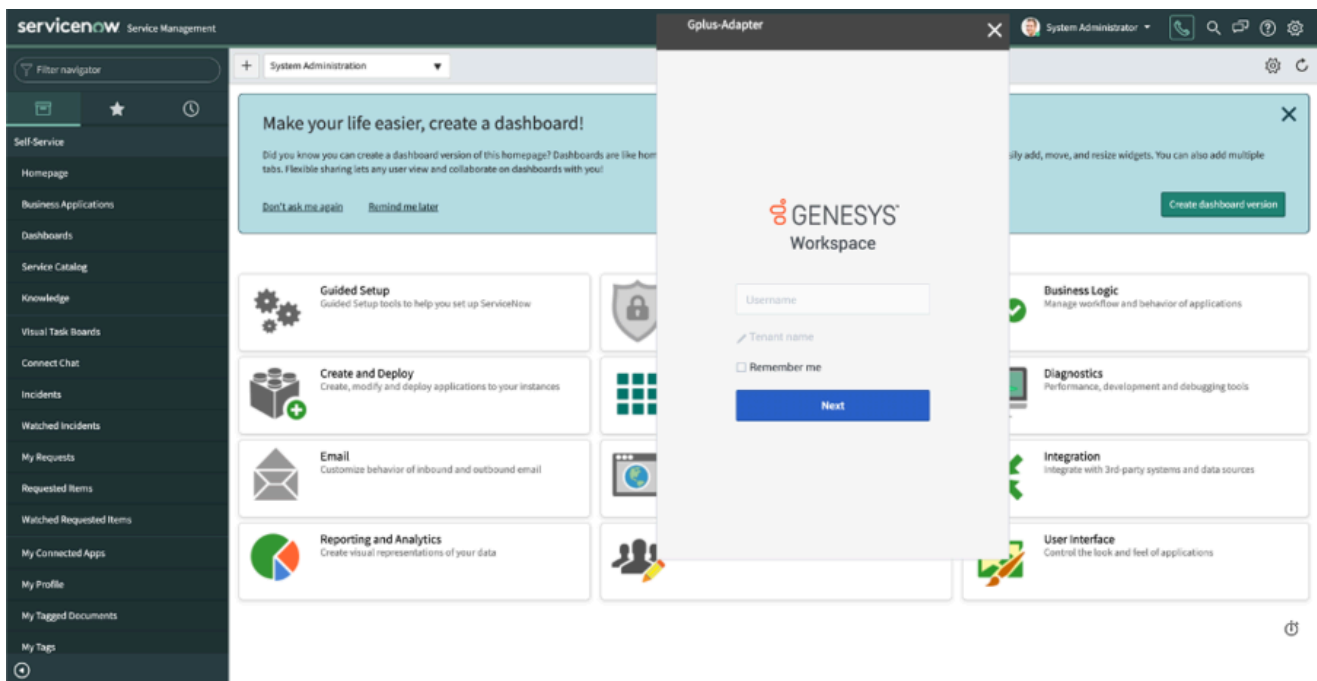
Link to video

Watch the following video if you are using the ServiceNow Agent Workspace.

Link to video

Log in

Using ServiceNow **OpenFrame**, Gplus Adapter is loaded and displayed during the ServiceNow login sequence. Log in to your ServiceNow account; then continue logging into the Genesys Adapter.
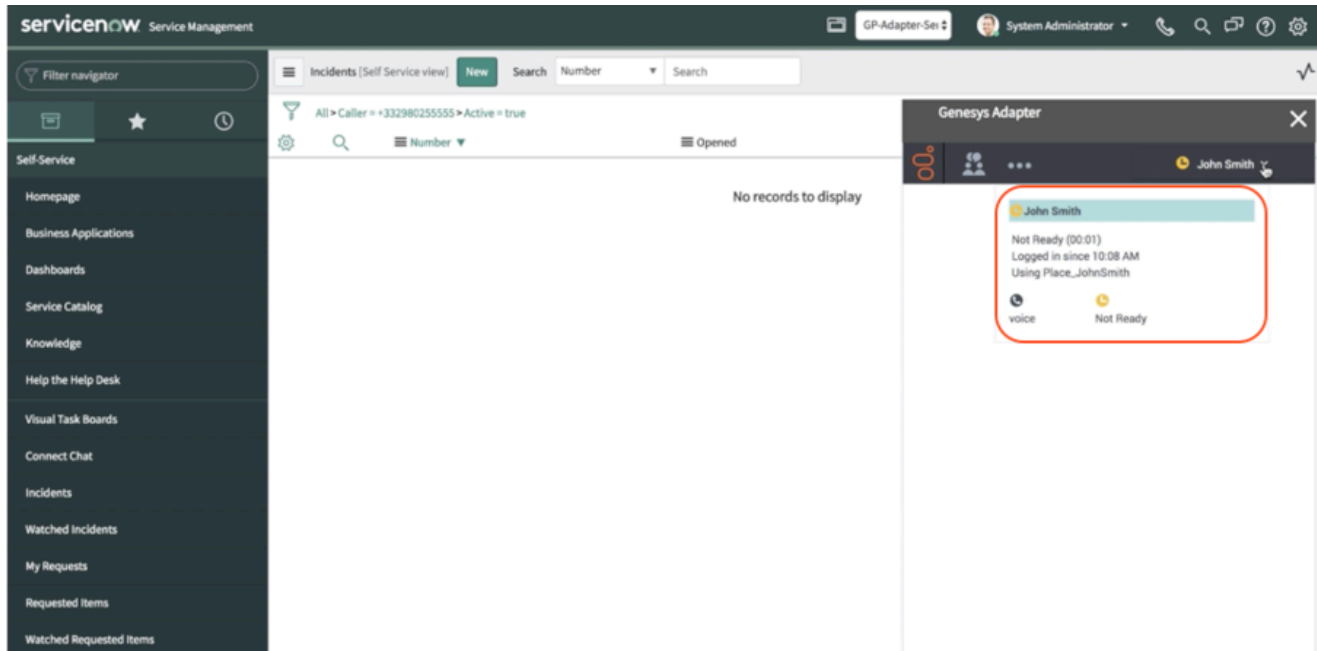

If you are prompted to log in, enter your Genesys username (like an email address) and password and click **Log in**. If you have logged in before, your username should already be entered. If you have logged into the Adapter previously, the login page automatically inputs your last known place. More often you can accept the last known place, before clicking **Log in**.

Gplus Adapter main view

After you log in, the main view is displayed. From this view, you can **change your status** and make calls.

The Genesys Gplus Adapter displays your name on the upper right. Click your name to check information about yourself: your current status, the duration of your status, your particular phone place, and your login time.
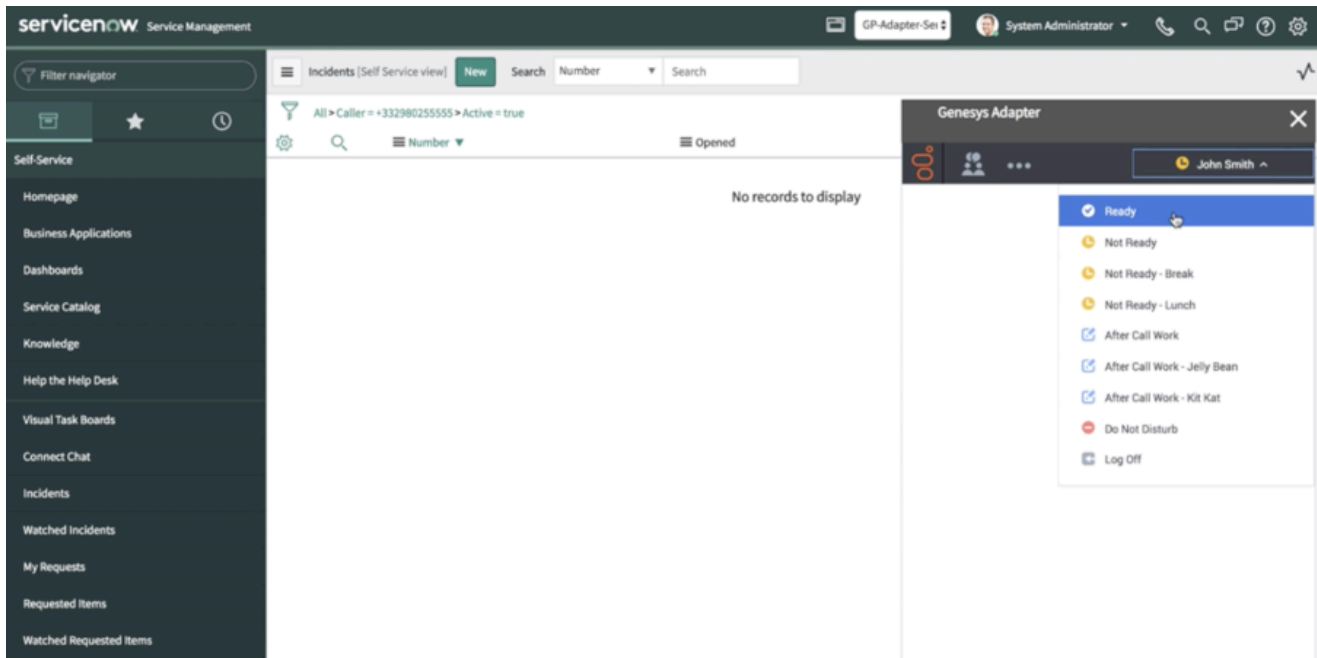

When you first log in, notice that your agent status is set for you — for instance, it could be **Not Ready**. Click your name to change your status; you can choose among:

- **Ready**
- **Not Ready** with or without a reason
- **Do not disturb**
- **Log Off**.

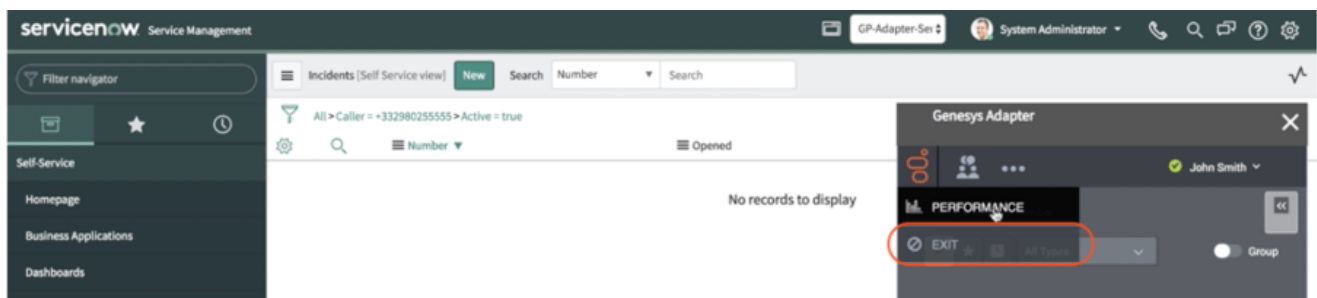**Log off** enables you to log out of Genesys but remain connected to the Adapter.

The default state you find at your first login is determined by your system administrator either for the whole contact center/agent group or specifically for you. If your status is not already set to **Ready**, change it in order to receive inbound calls.

Log out

To log off all channels and sign out of Gplus Adapter for ServiceNow, click the menu button and then select **Exit**.

The Adapter returns you to the login page, you must enter your credentials to log in again. When you log out, ensure your interactions are completed before logging out from ServiceNow and closing your browser window.
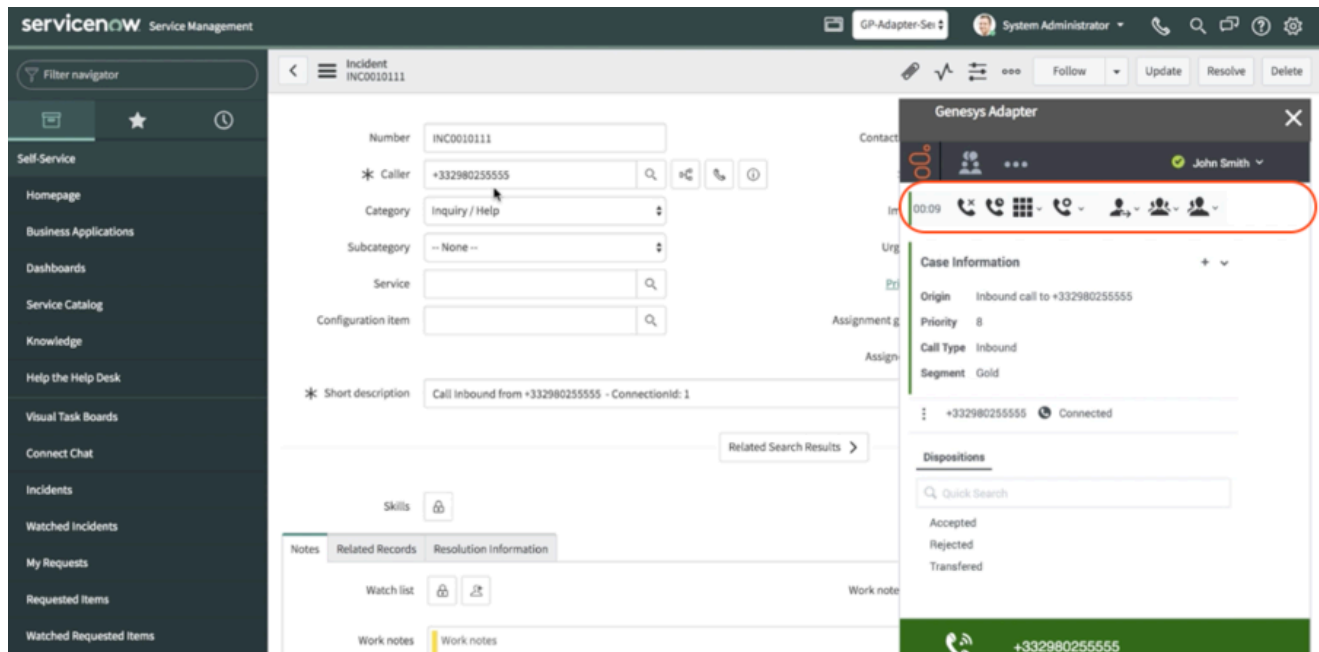
You can't sign out if there are any active calls. If you try, an error message is displayed. You must click **OK** before you can continue working with the Adapter.

Supported channels

The Gplus Adapter currently supports the **voice channel** and the **workitem channel**. It provides you with controls and features that enable you to handle voice interactions with contacts or internal targets (like other agents).

Voice user experience:

Once you are in an active call — because you called someone, or someone called you — the main view changes to the **active call toolbar**. It is visible at the top of the Adapter and displays all applicable call controls and a timer for the active call.
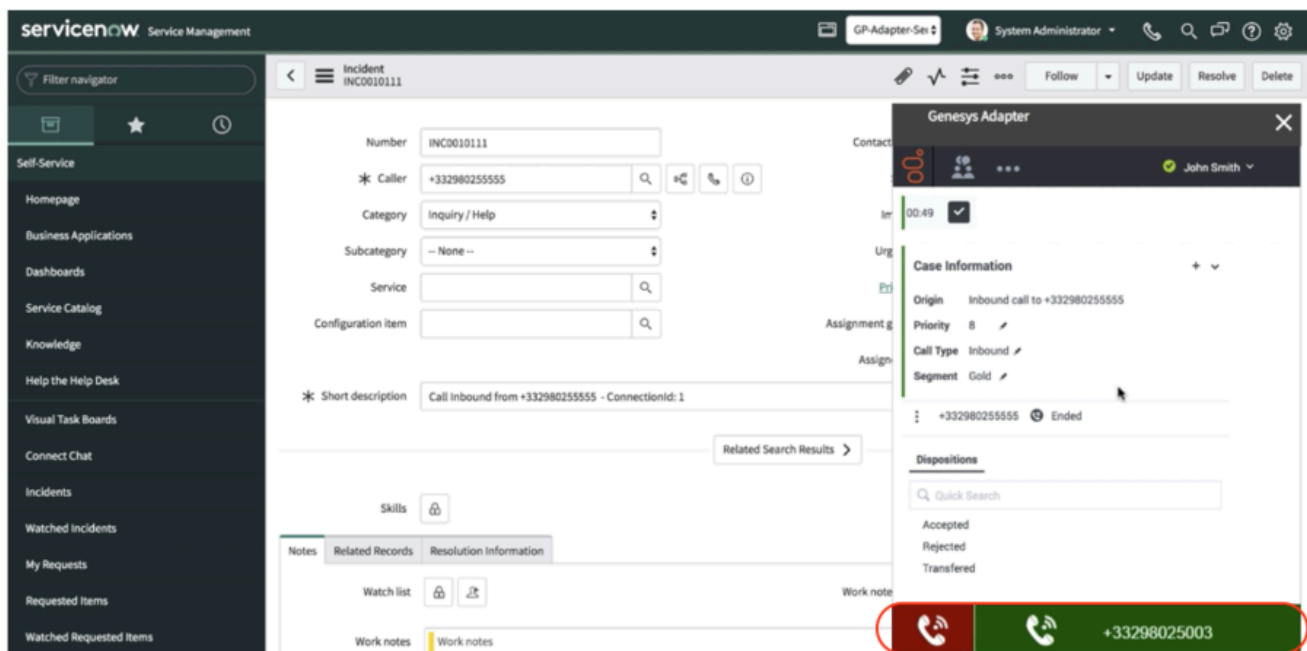

Call controls include:

Icon	Function	Description
	Release Call	Ends the call.
	Hold Call	Places the call on hold. After the call is holding, the Retrieve button is displayed.
	Direct Transfer	Redirects the call to another contact you select using Team Communicator.
	Consultative Transfer	Starts a consultation with another contact before transferring the call to that contact.

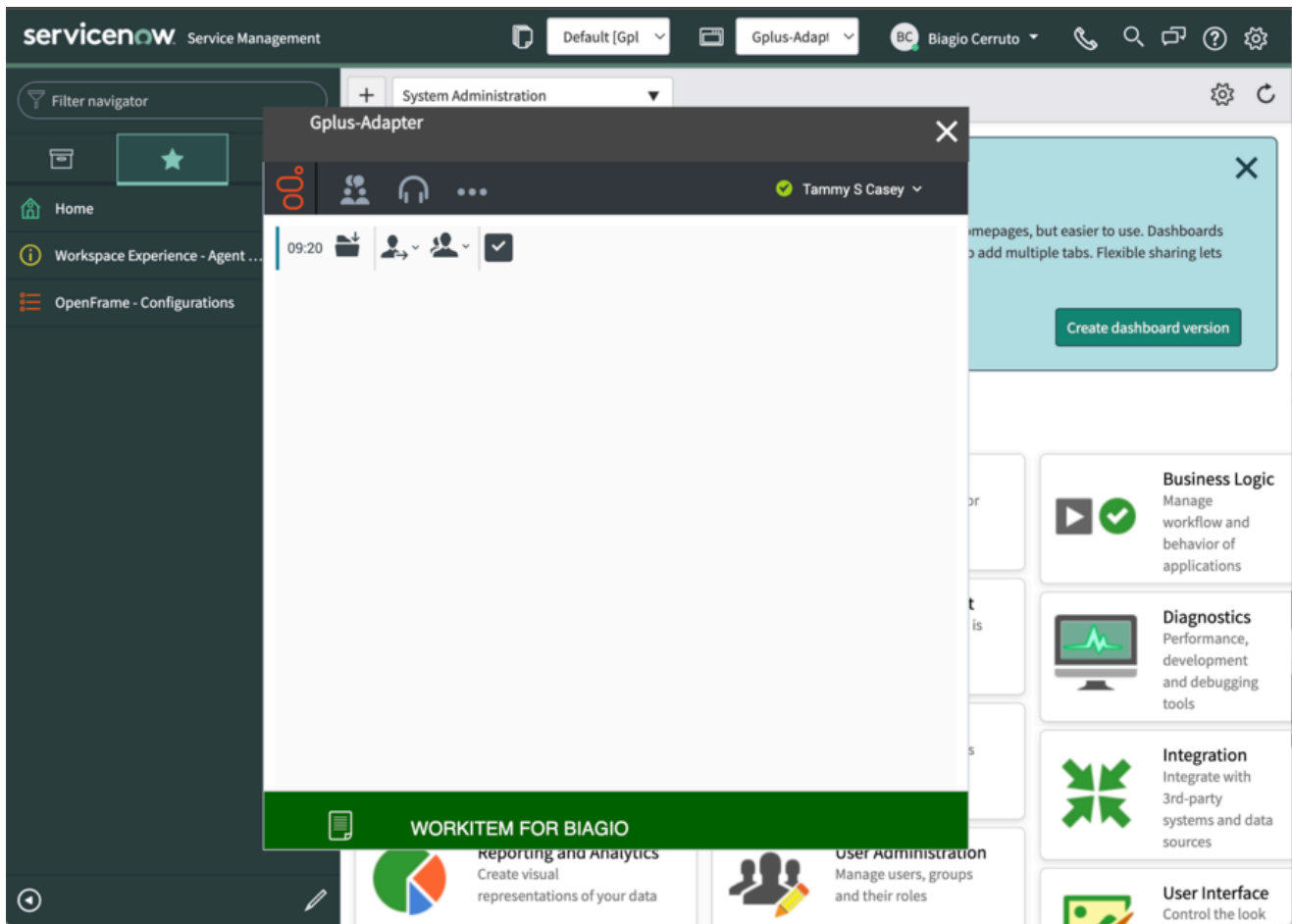| Icon	Function	Description
	Conference	Starts a voice conference instantly with the current caller and an additional contact that you select using Team Communicator.

In case of multiple interactions at the same time, you can click the **phone icon** at the bottom of the Adapter to verify the status of each call. A green bar indicates an active call; inactive calls are indicated by a red bar.

If you wish to learn how to work with the Adapter, continue to see the page How to manage inbound calls.
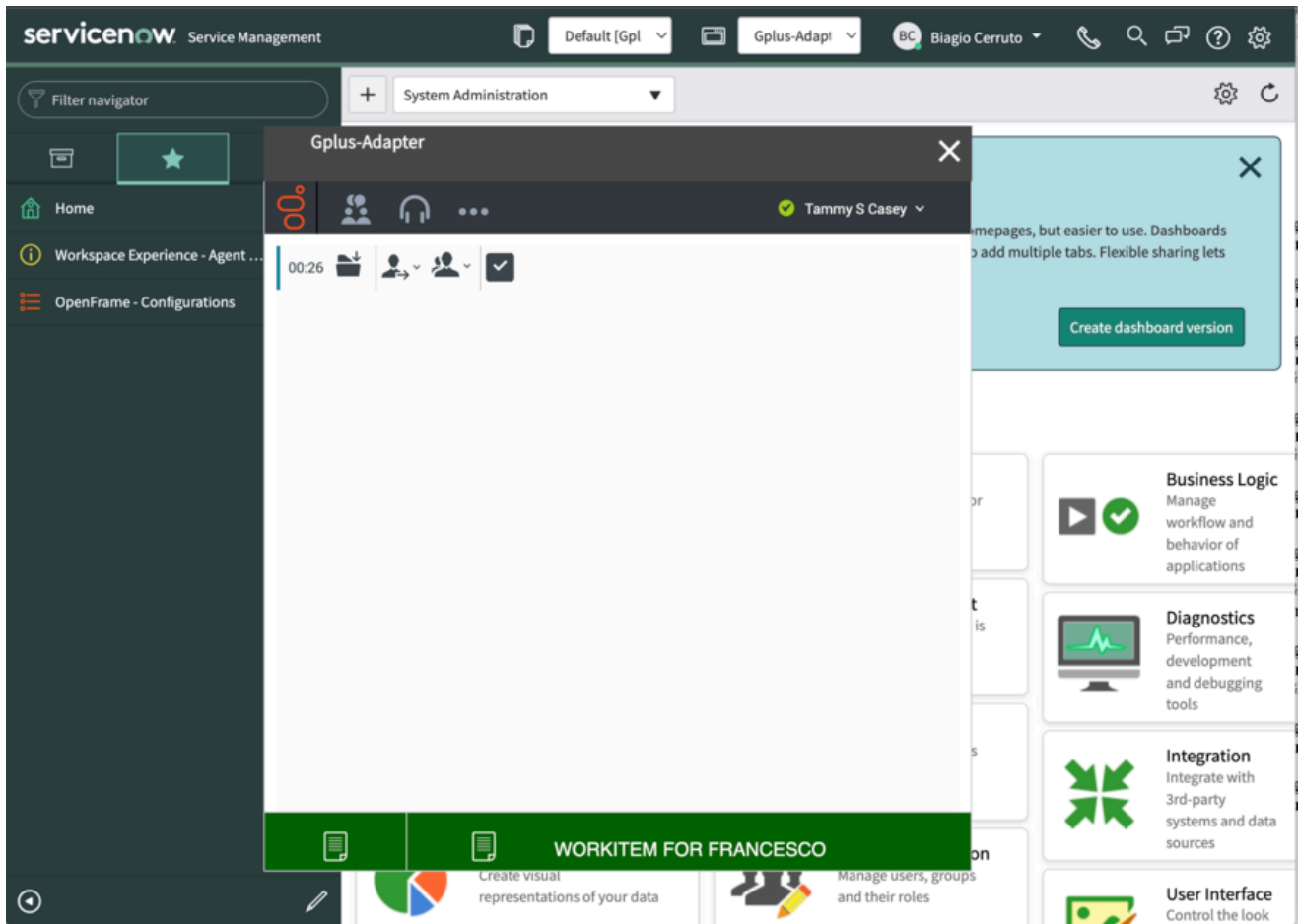
WorkItem interaction user experience:

When you handle a workitem the interaction window is displayed in the GPlus adapter:

Workitem controls include:

Icon	Function	Description
	Save to Workbin	Move the workitem back to workbin
	Direct Transfer	Redirects the call to another contact you select using Team Communicator.
	Consultative Transfer	Starts a consultation with another contact before transferring the call to that contact.
	Mark Done	Mark Done the workitem interaction

in case of multiple interactions at the same time, you can click the WorkItem Icon at the bottom of the Adapter to verify the status of each WorkItem Interaction

Relevant links

- How to manage inbound calls
- How to make outbound calls
- How to handle a workitem
- How to handle screen pops in ServiceNow
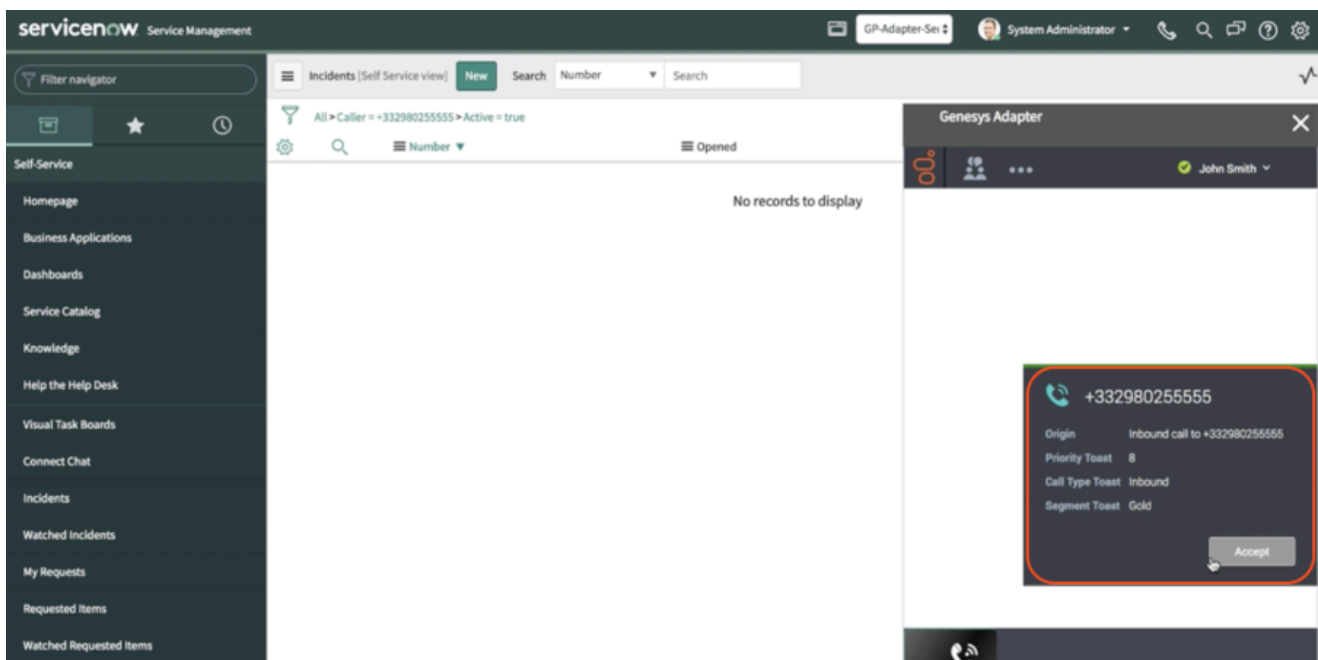
How to manage inbound calls

Contents

Here is everything you require to know to handle incoming interactions with the Gplus Adapter for ServiceNow.

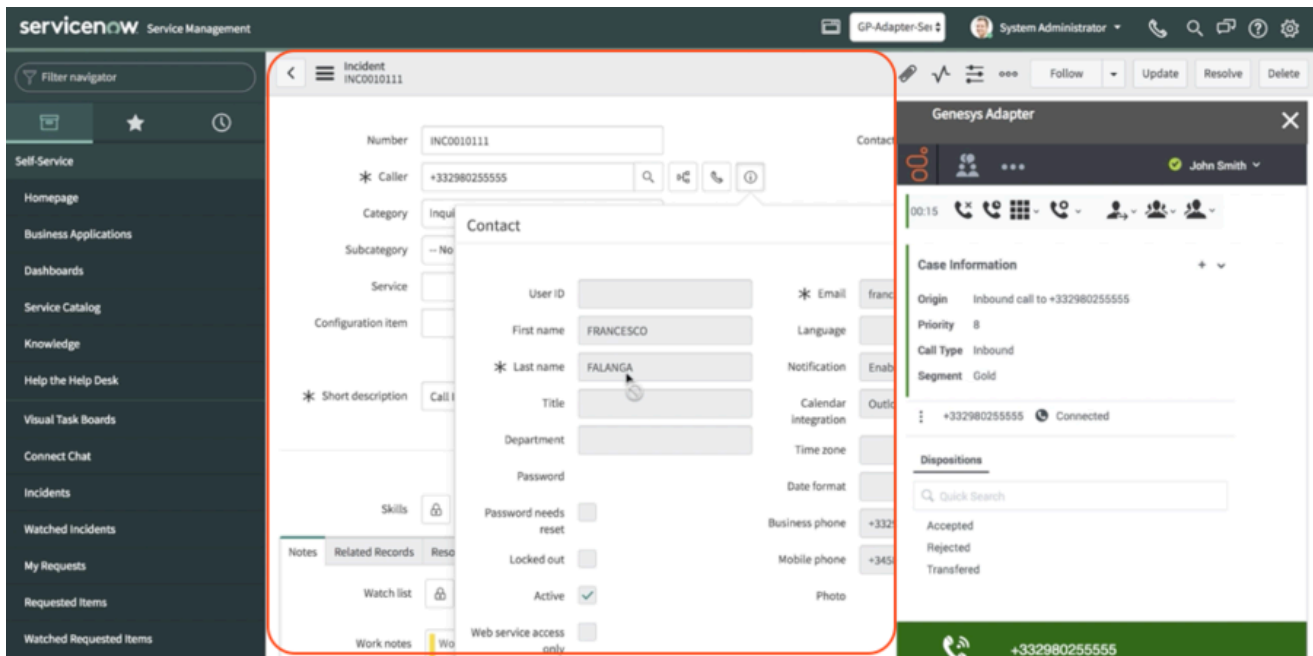## Inbound calls from a known contact

After you log in and make yourself available, you can receive inbound calls from the queue. When the Gplus Adapter alerts you of an incoming call, you receive a toast with **information about the call**. This information can include:

- the customer telephone number

- the number the customer dialed

- the type of call

- any additional data to identify the customer of the call.

To answer the call, click Accept. When you accept a call from an already known customer, you receive a ServiceNow screen pop of the record that matches the contact information of the caller. If you want to learn further on screen pops, see Know more about supported features.

Below the call controls, the Adapter shows the **Case Information section**, where you can examine information about the call. Your administrator determines the access and content of the Case Information section. You can also set the **Dispositions** of the call.

Click the **phone icon** at the bottom of the Adapter to discover more information about the call: the call type and direction, the state of the call (e.g. hold or release), and the telephone number.
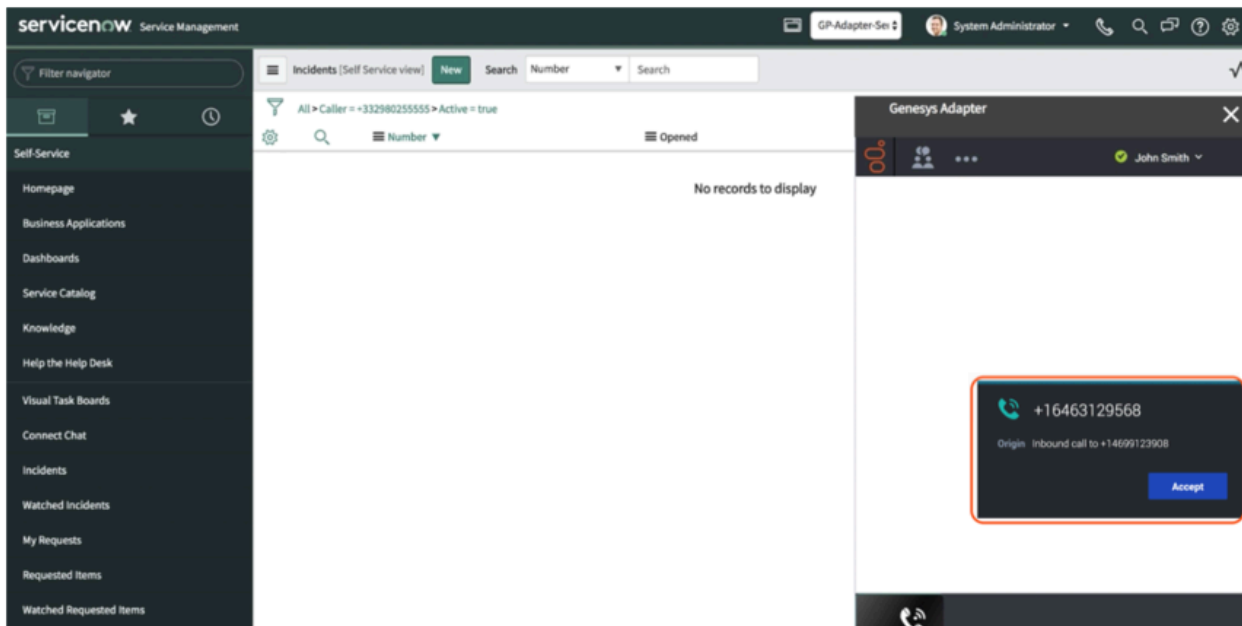

On top of that, an **Activity History of type Call** containing all information about the interaction is automatically created. The interaction remains active until you mark the call done. Remember you can't sign out if there are any active calls. To learn more about logging out, see Get started with Gplus Adapter.

Inbound calls from an unknown contact

The procedure is almost similar to the previous case but with a few differences.

When the Gplus Adapter alerts you of an incoming call, you receive a toast with **information about the interaction**. This information is configured by your system administrator.

After clicking **Accept**, you receive a ServiceNow screen pop with an incoming Activity History of type Call. If you want to learn more on screen pops and Activity Histories, check Know more about supported features.

The interaction remains active until you mark the call done. Remember you can't sign out if there are any active calls. To learn more about logging out, see Get started with Gplus Adapter.

If you want to see how to handle outgoing interactions, proceed to How to make outbound calls.

Relevant links

- Get started with Gplus Adapter
- How to make outbound calls
- Know more about supported features
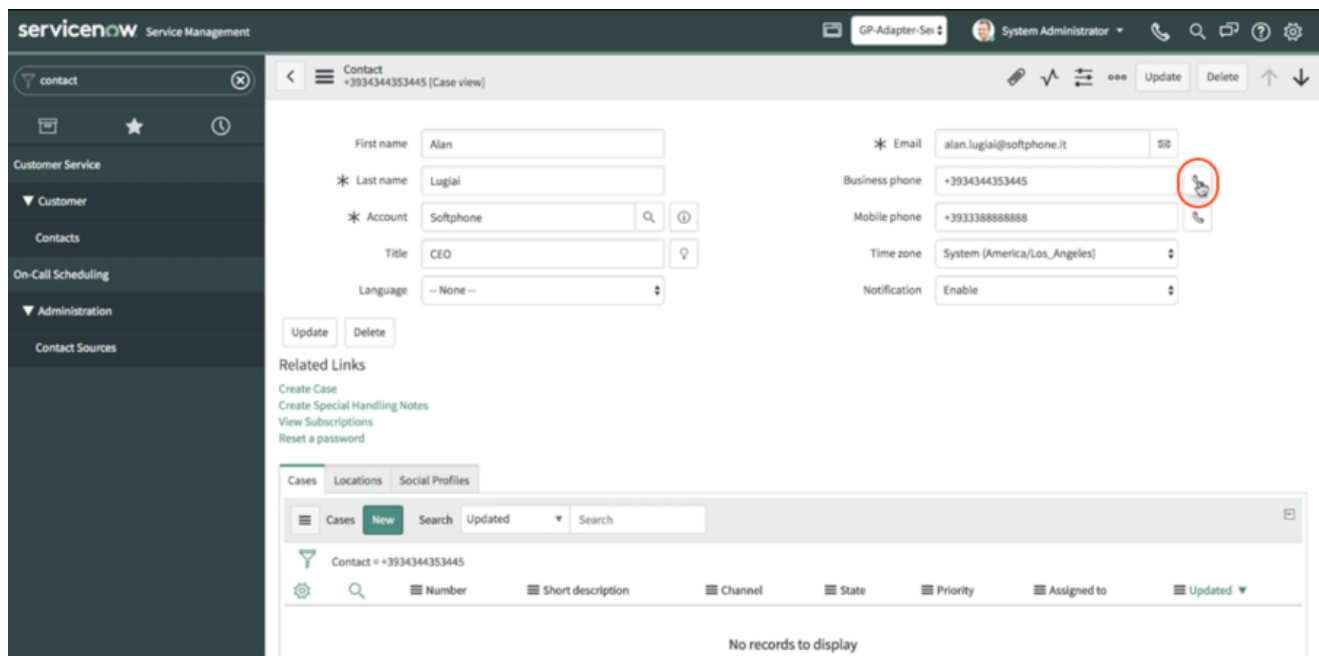
How to make outbound calls

Contents

Here is everything you require to know to handle outgoing interactions with the Gplus Adapter for ServiceNow.

Outbound calls to a known contact

As one would expect, you can equally make outgoing calls. However, you can exclusively make outbound calls to records already existing in ServiceNow. If you wish to call a brand-new contact, first you need to register it within the CRM.
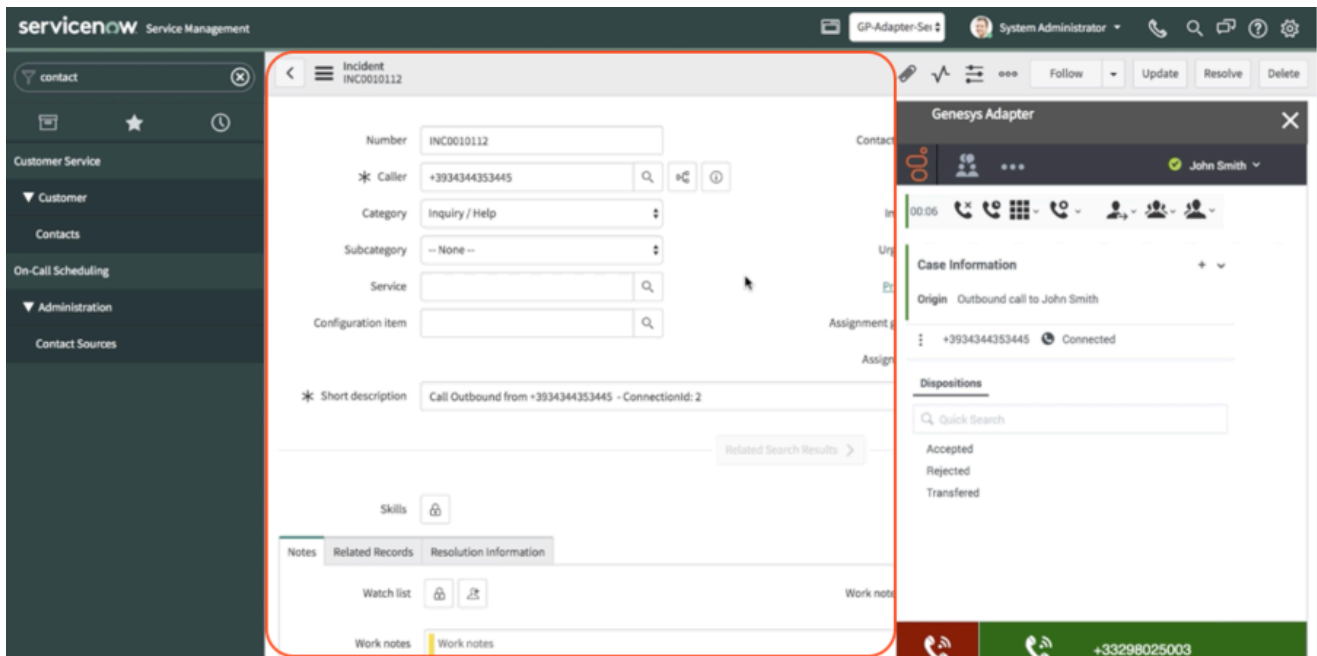
You can make outbound calls just clicking the **phone icon** next to the selected contact telephone number. For further information on the click-to-call feature, see Know more about supported features.

When the outbound call connects, you receive a Service Now **screen pop** with an outgoing Activity History of type Call.

If you want to learn more about screen pops, see Know more about supported features.

Relevant links

- How to manage inbound calls
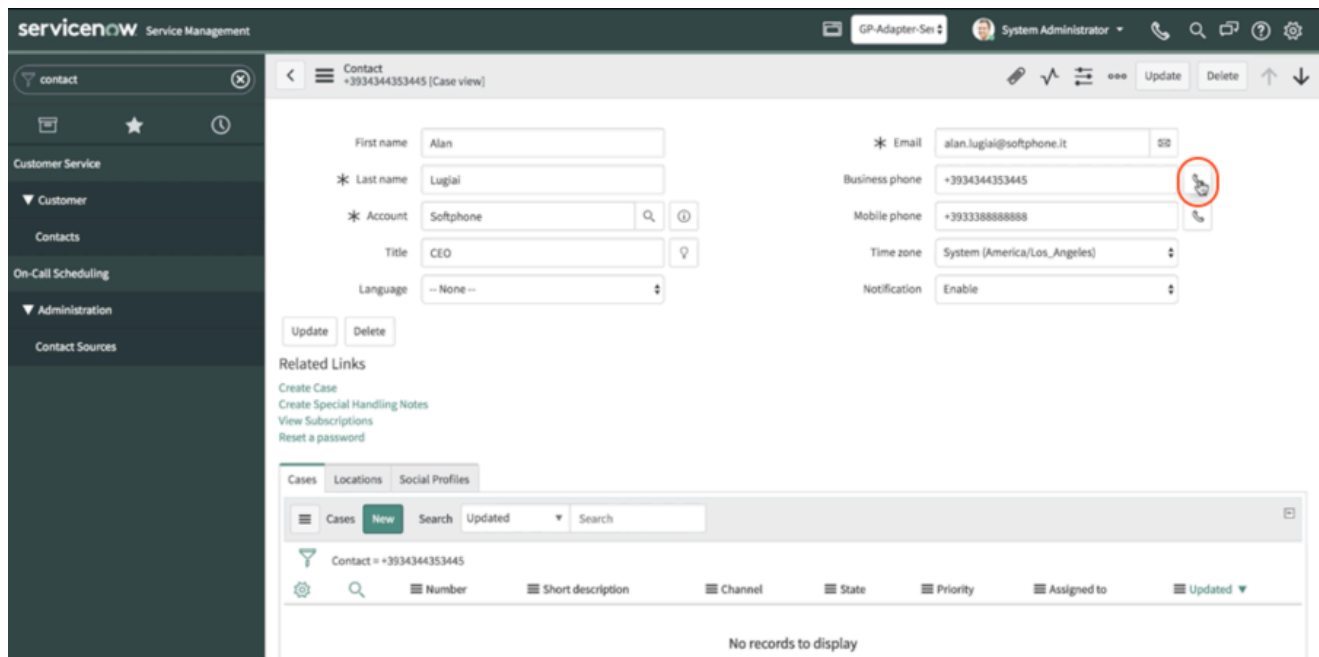- Know more about supported features

Know more about supported features

Contents

This section presents the Gplus Adapter supported features that require a more in-depth explanation.

Click-to-call

With the click-to-call feature, all you need to perform is clicking the **phone icon** next to a telephone number within ServiceNow and the Gplus Adapter automatically dials it and starts the call. For example, you might search for a contact in ServiceNow and then click the related telephone number.

Screen pops

Screen pops are managed and customized by your contact center administrator. Here us how they typically work in an out-of-the-box scenario.

As soon as you accept an inbound call, a search based on the **Automatic Number Identification (ANI)** is automatically launched. If an associated contact is found, a **screen pop** is triggered inside ServiceNow: the contact detail form opens and displays the data to you. At the same time, an Activity History of type Call —containing all information about that inbound call — is automatically created in ServiceNow and made available on the related Contact landing page.

For outgoing calls, as soon as the interaction connects, you receive a ServiceNow screen pop with an

outbound Activity History of type Call, which will also be available on the related Contact landing page.

To learn more about Activity Histories, you can read the following paragraph dedicated to the topic.

Activity history

The screen pop you receive when either accept or make a call equally creates a new Activity History of type Call. If the **Automatic Number Identification (ANI)** is recognized by ServiceNow, the Activity History is linked to the **known Contact**.

Take a look at the table below for an extensive list of ServiceNow fields included in each Activity and their description.

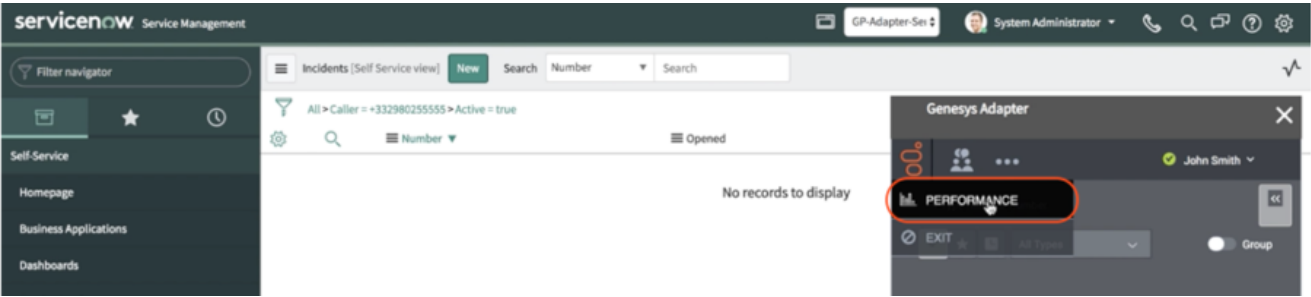| ServiceNow Activity Field	Description
Subject	Interaction ID
Call From	Inbound call: contact from which originated the call Outbound call: agent making the call
Call To	Inbound call: agent accepting the call Outbound call: contact receiving the call
Phone Number	The telephone number from which the call originated
Direction	Type of call (inbound, outbound or internal)
Duration	Length of the call in minutes and seconds (updated when the call ends)
Description	Comments and notes added by the involved agent(s)

The Gplus Adapter allows investigating the content of the **Genesys interaction** directly from the Activity automatically created.

If you want to learn more about screen pops, check the previous paragraph dedicated to the topic.

Performance Tracker

While the Gplus Adapter's main view allows you to access the most common tools that you use every day, such as handling calls and changing your status, there is a supported feature allowing you to monitor and track your performance: the Performance Tracker.

By default, you can reach the Tracker by clicking the **three-dots icon** on the main bar and then selecting **Performance**. However, this view can be customized by your system administrator.

Know more about supported features

The Performance Tracker view displays a list of your **Key Performance Indicators (KPIs)**, set up by your system administrator.

Your KPIs are shown as tri-colored bars with a white triangle indicating your standing. The name of the KPIs appears exactly below the bar. If you are not satisfying one of your KPIs, the white arrow points to **yellow** and **red**. When you are fulfilling them, the white arrow moves to **green**.
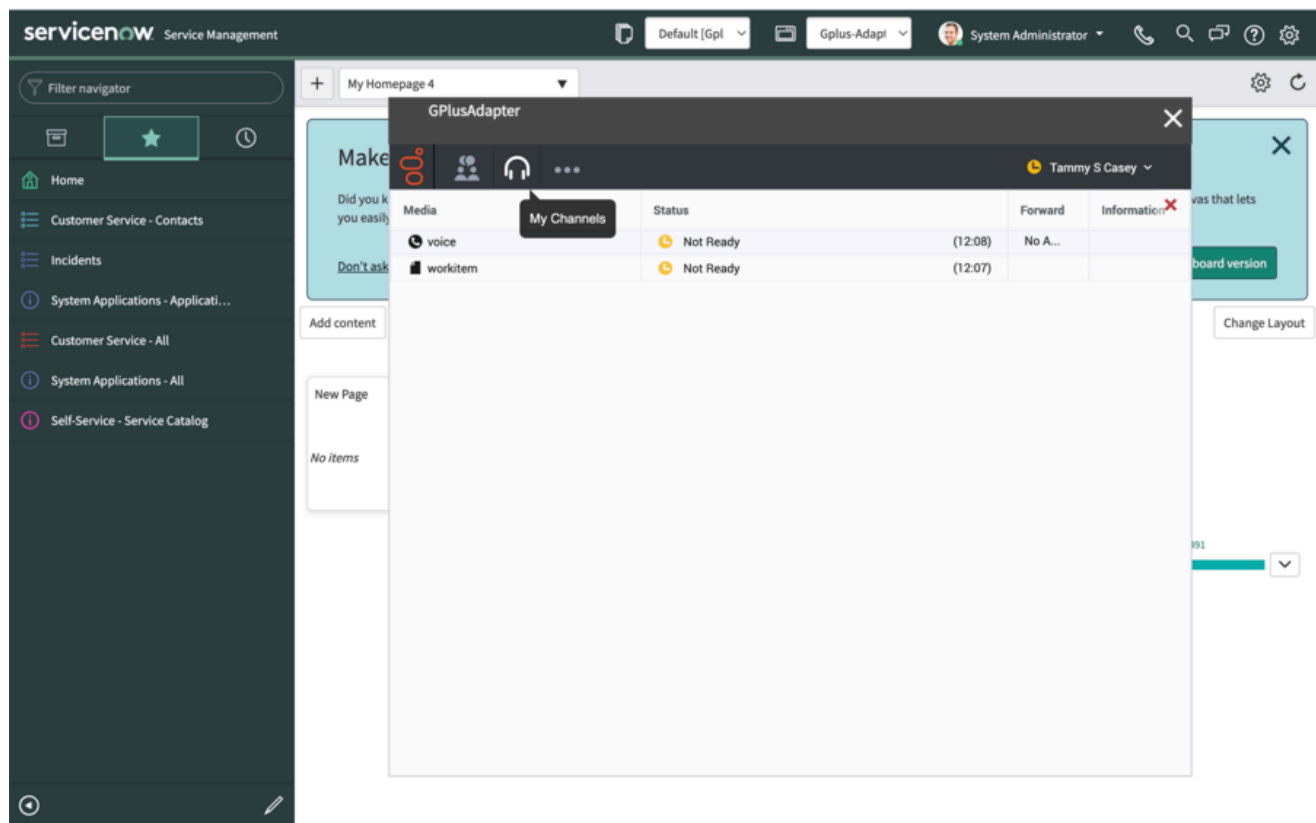

Each statistic also displays the statistic value under the colored bar to indicate what your current value is for that data point. If you receive any warnings, they are presented next to your statistic value in form of icons:

Icon	Name	Description
	Worst icon	Displayed if the evaluation of your performance is below the expected worst level for that KPI or contact center statistic.

Icon	Name	Description
	Error icon	Displayed if the evaluation of your performance is below the expected error level for that KPI or contact center statistic.
	Warning icon	Displayed if the evaluation of your performance for that KPI or contact center statistic goes beyond the expected warning level.

My Channels

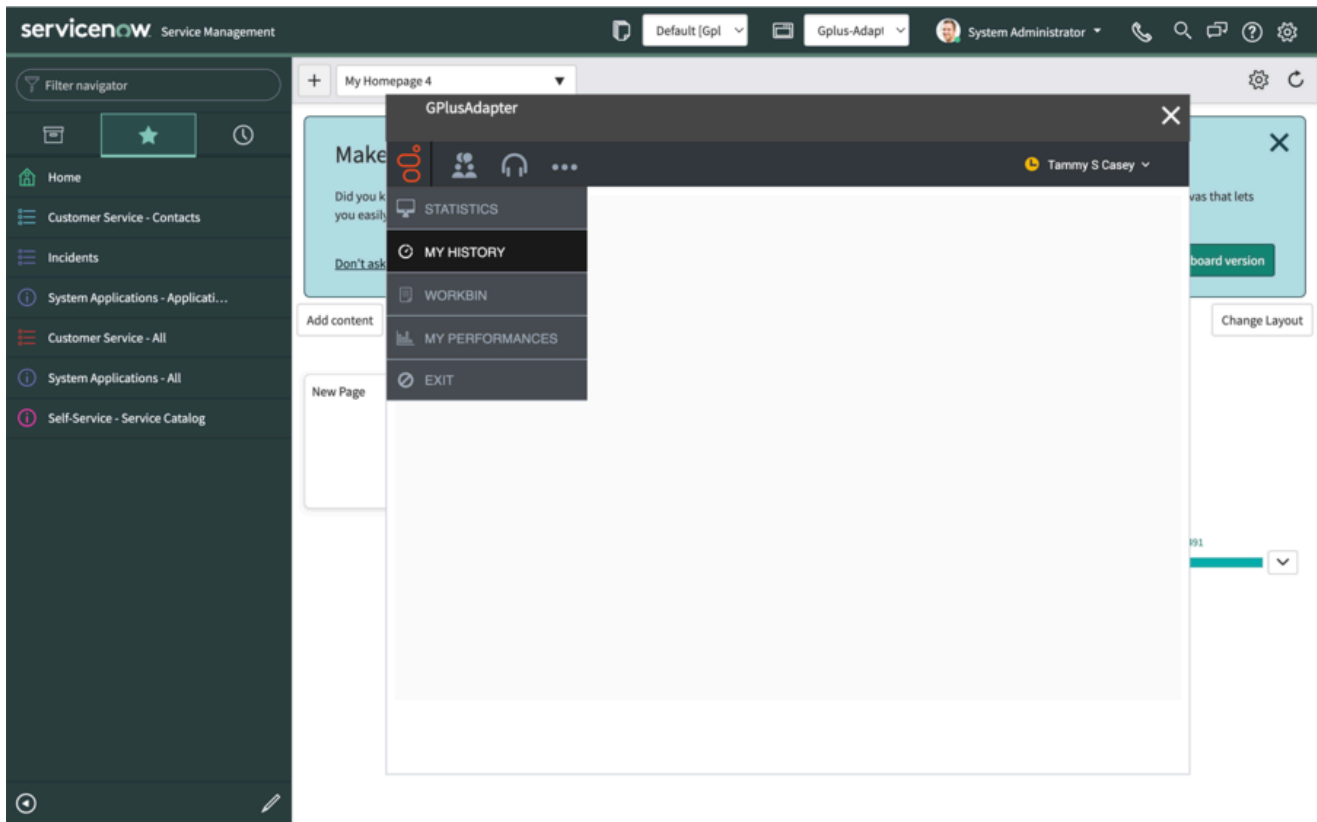Clicking on the headset icon in the GPlus toolbar will open the my channels view as shown in the following picture:

It is possible to change the status of each channel independently. You can just right click with your mouse on a single channel and select the status for that channel.

My History

Clicking on the three dots icon in the GPlus toolbar will open a menu showing additional items. In the menu you can select "My History":

Know more about supported features

The history view will be opened showing the last interactions that you have handled with GPlus.

My Statistics

Clicking on the three dots icon in the GPlus toolbar will open a menu showing additional items. In the menu you can select "My Statistics":

The statistic view will show the contact center performance. Your Administrator can configure the object available in the view.
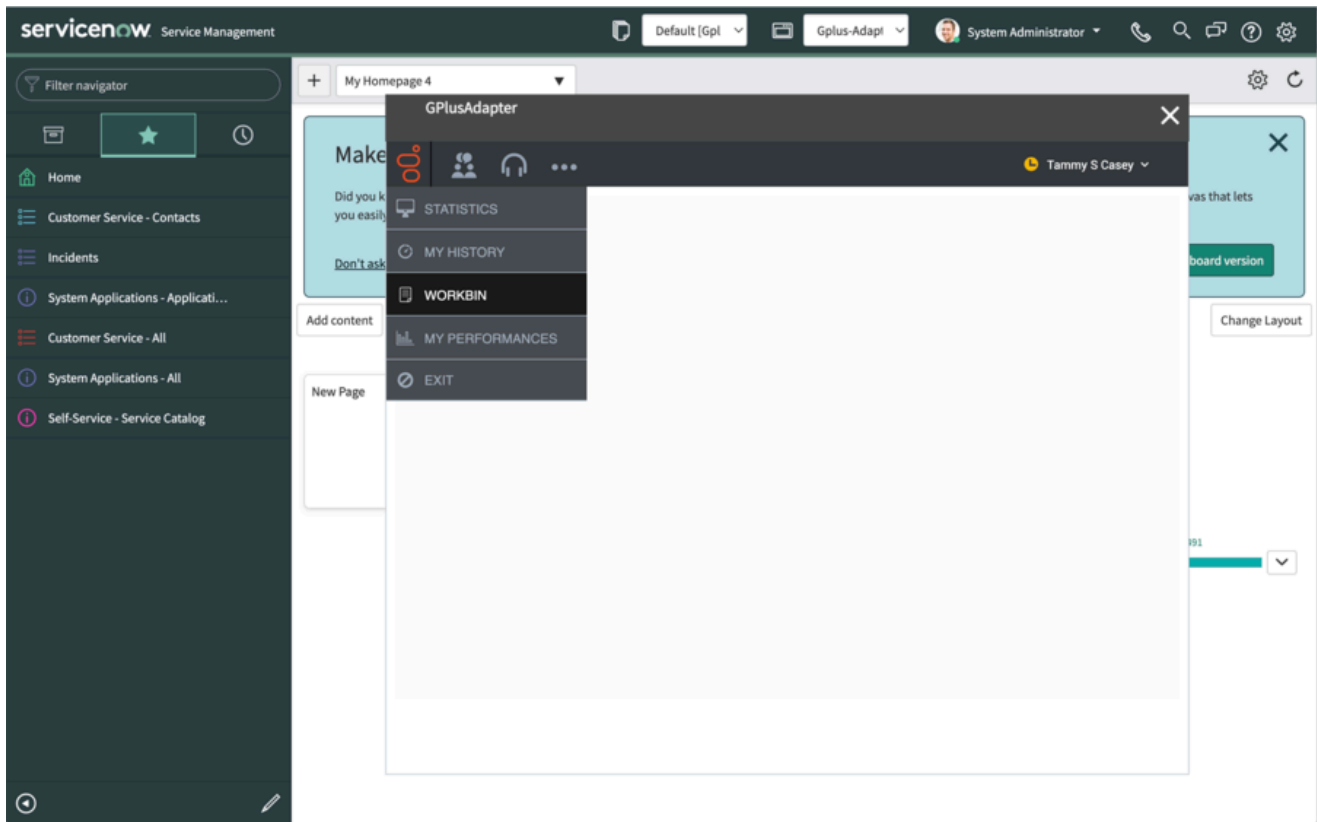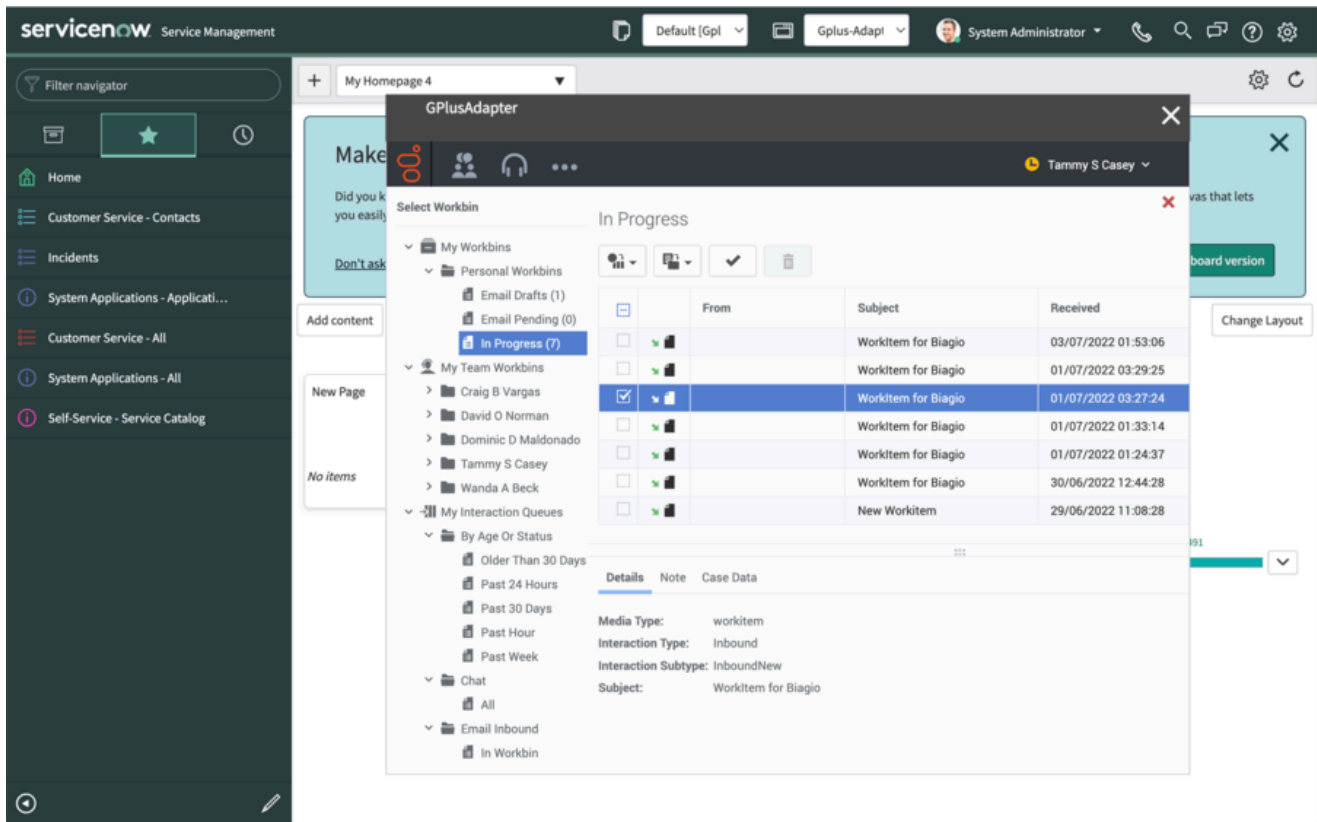
Workbins

Clicking on the three dots icon in the GPlus toolbar will open a menu showing additional items. In the menu you can select "My WorkBins":

The workbin view will show the interactions in progress saved in your workbins:

Related links

- Get started with Gplus Adapter
- How to manage inbound calls
- How to make outbound calls
- How to handle a workitem