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Gplus Adapter for Salesforce Administrator's Guide

7/27/2024

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Related documentation:

-

Gplus Adapter for Salesforce (v9)

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- [2 How do I setup Gplus Adapter in Salesforce Lightning?](#)
- [3 How do I setup Gplus Adapter in Salesforce Classic?](#)
- [4 How do I migrate Gplus Adapter from an earlier version?](#)
- [5 How do I configure Gplus Adapter functionality?](#)
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Genesys Multicloud CX offers Gplus Adapter functionality to integrate Genesys contact center interactions within the Salesforce environment.

Related documentation:

-

The integrated solution presents a complete customer view allowing your contact center agents to service your customers.

See the Genesys Multicloud CX system requirements for a list of the browsers supported for Gplus Adapter.

Important

- The Gplus Adapter URL in Salesforce Call Center follows this format: `https:///ui/crm-workspace/index.html`
- Gplus Adapter integration does not rely on legacy Salesforce API versions; therefore, changes to the Salesforce API do not affect Gplus Adapter integration.

Salesforce Lightning and Salesforce Classic

Gplus Adapter supports the following features and environments for both Salesforce Lightning and Salesforce Classic:

- Genesys media channels: voice, chat, SMS, email, and workitems. This document describes the common functionality and notes those features where support for Salesforce Classic is different from Salesforce Lightning.
- Salesforce Winter '22 release.
- Salesforce Service Cloud.
- Salesforce Sales Cloud.
- Salesforce High Velocity Sales.
- Genesys Smart Failover for disaster recovery scenarios.
- Salesforce Shield Platform Encryption.
- Browser-based WebRTC voice calling.
- Integration with Genesys Softphone.

- Environments that use Reverse Proxy configuration.

The following features and environments are required for both Salesforce Lightning and Salesforce Classic:

- Salesforce Console in both Lightning and Classic.

How do I setup Gplus Adapter in Salesforce Lightning?

You can setup Gplus Adapter by following the procedures described in [Integrating Gplus Adapter in Salesforce Lightning](#).

How do I setup Gplus Adapter in Salesforce Classic?

You can setup Gplus Adapter by following the procedures described in [Integrating Gplus Adapter in Salesforce Classic](#).

How do I migrate Gplus Adapter from an earlier version?

Follow this procedure to migrate your existing Gplus Adapter 8.5 to Gplus Adapter 9.0 for Salesforce.

How do I configure Gplus Adapter functionality?

First set up corresponding Salesforce objects and configurations, then enable Gplus options in Agent Setup.

You can configure the following Salesforce functionality:

- SSO
- Click-to-dial
- Screen pop
- Activity History

How do I troubleshoot Gplus Adapter

To troubleshoot screen pop and **saveLog()** method errors, refer to [Troubleshooting Gplus Adapter Integration with Salesforce](#).

Gplus also enables you to view notifications of successful object creation on screen pop and activity task updates.

How do I access Gplus Adapter?

You can access Gplus Adapter by logging into Salesforce and clicking the **Genesys Gplus [Please login]** icon at the bottom-left corner of the window (bottom-right for Classic users). You will see a pop-up window where you can login with your Genesys credentials and start using the complete set of Genesys contact center functionalities.

Integrating Gplus Adapter in Lightning

Contents

- [1 Gplus Adapter for Salesforce \(Genesys Multicloud CX\)](#)
 - [1.1 How to create a Gplus Adapter URL](#)
 - [1.2 Steps to setup and access Gplus Adapter in Salesforce](#)
- [2 Gplus Adapter for Salesforce \(Azure\)](#)
 - [2.1 How to create a Gplus Adapter URL](#)
 - [2.2 Steps to setup and access Gplus Adapter in Salesforce](#)
- [3 Integrating Gplus Adapter in Salesforce Lightning](#)
- [4 Adding users to Call Center](#)
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- [6 Multi-region and multiple Salesforce Call Centers configuration](#)
- [7 Accessing Gplus Adapter](#)

- Administrator

The steps to setup and access Gplus Adapter in Salesforce Lightning.

Related documentation:

-

Important

If you are migrating from Adapter 8.5, you must first follow the migration procedure in this article.

Important

For information about integrating Gplus Adapter in Classic, go here.

Gplus Adapter for Salesforce (Genesys Multicloud CX)

Follow these steps if you use Genesys Multicloud CX on Amazon Web Services (AWS).

How to create a Gplus Adapter URL

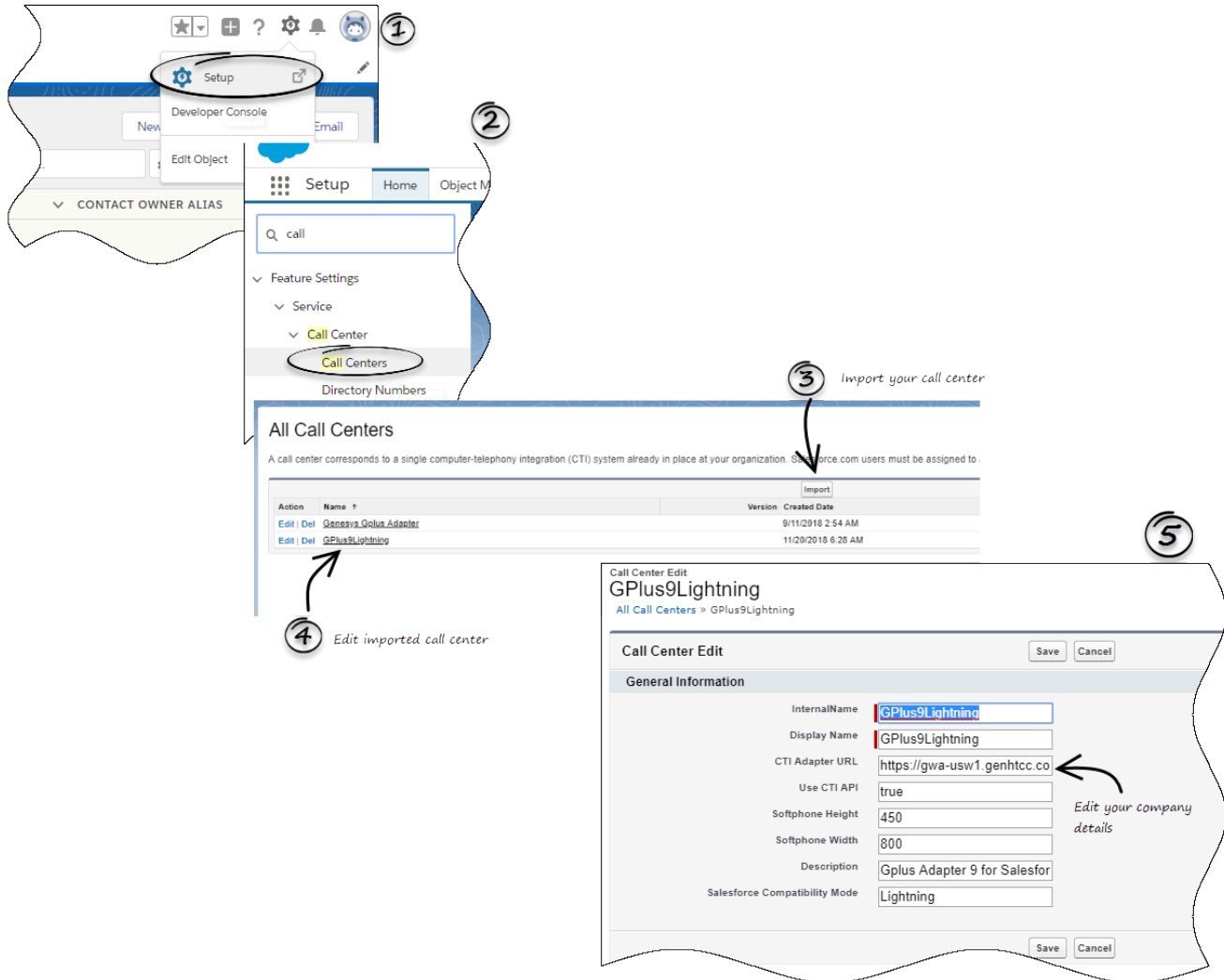
1. Ensure that Agent Workspace release 9 has been enabled in your environment by confirming that the Agent Workspace 9 application icon is displayed in your Genesys Portal.
2. In the Portal, click the **Agent Workspace** icon to launch Agent Workspace and then copy the domain name from the Agent Workspace URL to build Gplus Adapter URL. For example, copy `gwa-.genesyscloud.com` from the Agent Workspace URL. The domain in the Agent Workspace URL should be used in Gplus Adapter URL.
3. The Adapter URL will look like this:
`https://gwa-.genesyscloud.com/ui/crm-workspace/index.html`

Steps to setup and access Gplus Adapter in Salesforce

1. Enable **Lightning** in your Salesforce environment.
2. Integrate Gplus Adapter in Salesforce Lightning.
3. Add users to your Call Center.
4. Configure the Utility bar for Gplus Adapter for the agents to easily access the application.
5. Configure Gplus Adapter SSO.

Integrating Gplus Adapter in Salesforce Lightning

Follow these steps:



1. Click the gear icon in the top right corner and then click **Setup**.
2. Using the **Quick Find** field, search for and access the **Call Centers** setup page.
3. Using the **Import** functionality, import the lightning-callcenter.xml file from your computer. If you have not already downloaded the file, download it from here.
4. From the **All Call Centers** list, click the Call Center you just imported. For example, **GPlus9Lightning**.
5. Take the Adapter URL that you built at the beginning of this article and enter it in the **CTI Adapter URL** field.
6. Save the changes.

Adding users to Call Center

Call Center
GPlus9Lightning
[All Call Centers](#) » GPlus9Lightning

Call Center Detail Edit Delete Clone

General Information

InternalName	GPlus9Lightning
Display Name	GPlus9Lightning
CTI Adapter URL	https://gwa-usw1.genhtcc.com/ui/crm-workspace/index.html
Use CTI API	true
Softphone Height	450
Softphone Width	800
Description	Gplus Adapter 9 for Salesforce - Lightning
Salesforce Compatibility Mode	Lightning

Call Center Users Manage Call Center Users

Call Center Users by Profile

System Administrator	2
Total	2

The next step after you setup your Adapter is to add users to your call center. You must add at least one user to your call center.

1. In the **Call Centers** setup page, click **Manage Call Center Users**.
2. Click **Add More Users**.
3. Search the interface to find the users you want to add to Gplus Adapter.
4. Select the users you want to add and click **Add to Call Center**.

Tip

From the **Manage Users** page, select the users you want to remove from a call center and click **Remove Users**.

Configuring the Utility bar

The screenshot displays the 'App Settings' interface for a Lightning app. The 'Utility Items (Desktop Only)' section is active, showing a list of utility items on the left and their configuration properties on the right. The 'Workspace' utility item is selected, and its properties are visible, including 'Label' (Workspace), 'Icon' (call icon), 'Panel Width' (850), 'Panel Height' (500), and a checked 'Start automatically' checkbox. A tooltip on the right explains that enabling 'Start automatically' allows users to receive incoming calls before they open the utility.

1. In the setup page, using the **Quick Find** field, search for and access the **App Manager** settings page.
2. Create a new application by clicking **New Lightning App**. Follow the steps in New Lightning App creation procedure in Salesforce documentation.
3. When creating a new Lightning app, follow the additional steps below to configure the utility items for your Gplus Adapter.
 - In the **App Options** step, ensure that you select **Console Navigation**. Gplus Adapter does not support **Standard Navigation**.
 - In the **Utility Items** step, add Open CTI Softphone by clicking **Add Utility Item**.
 - For the soft phone, you can modify the display properties such as **Label**, **Panel Width** and **Panel Height**.
 - Select **Start automatically** to start loading the data when the Gplus Adapter first opens to ensure that it initializes immediately; otherwise, Gplus Adapter does not load until an agent first opens it from the **Utility Bar**. If Gplus Adapter is not initialized immediately, then agents do not receive voice calls until they first open the application.
4. Specify **Navigation Items** and **User Profiles** for the new Lightning app by referring to Salesforce documentation.
5. Save the application.

Multi-region and multiple Salesforce Call Centers configuration

Your Genesys Multicloud CX deployment may have multiple regions. For multiple regions you must create a unique Salesforce Call Center for each region and use the CTI Adapter URL specific to each

region. Agents may only be assigned to a single Salesforce Call Center. Agents assigned to one region may not access other regions unless their Salesforce account is moved from one Salesforce Call Center to another Call Center. Follow these steps to create a Salesforce Call Center for a second region:


1. Clone your existing Salesforce Call Center.
2. In the new Salesforce Call Center replace the **CTI Adapter URL** with the second region URL. For example <https://gwa-genesyscloud.com/ui/crm-workspace/index.html>.
3. Add agents for the second region to the created Call Center. **Note:** Agents must be assigned to one Salesforce Call Center only.

Important

The same Genesys Contact Center field mapping configuration is shared by the two Salesforce Call Centers.

Accessing Gplus Adapter

You can access the Gplus Adapter application by following the procedure below.

1. In the top-left corner, click the **App Launcher** icon  .
2. Select the app that you created when setting up the Gplus Adapter application.
3. Click the phone icon from the bar at the bottom-left corner to open the Gplus Adapter application.
4. Log in to the application to start using the Genesys contact center functionalities.

Integrating Gplus Adapter in Classic

Contents

- [1 Migrating Gplus Adapter 8.5 for Salesforce Classic to 9.0](#)
- [2 Installing Gplus Adapter in Salesforce Classic](#)
- [3 Configuring Salesforce for Gplus Adapter](#)

- Administrator

The steps to setup and access Gplus Adapter in Salesforce Classic.

Related documentation:

-

Important

For information about integrating Gplus Adapter in Lightning, go here.

Migrating Gplus Adapter 8.5 for Salesforce Classic to 9.0

If you are migrating from Gplus Adapter 8.5 for Salesforce, follow these steps:

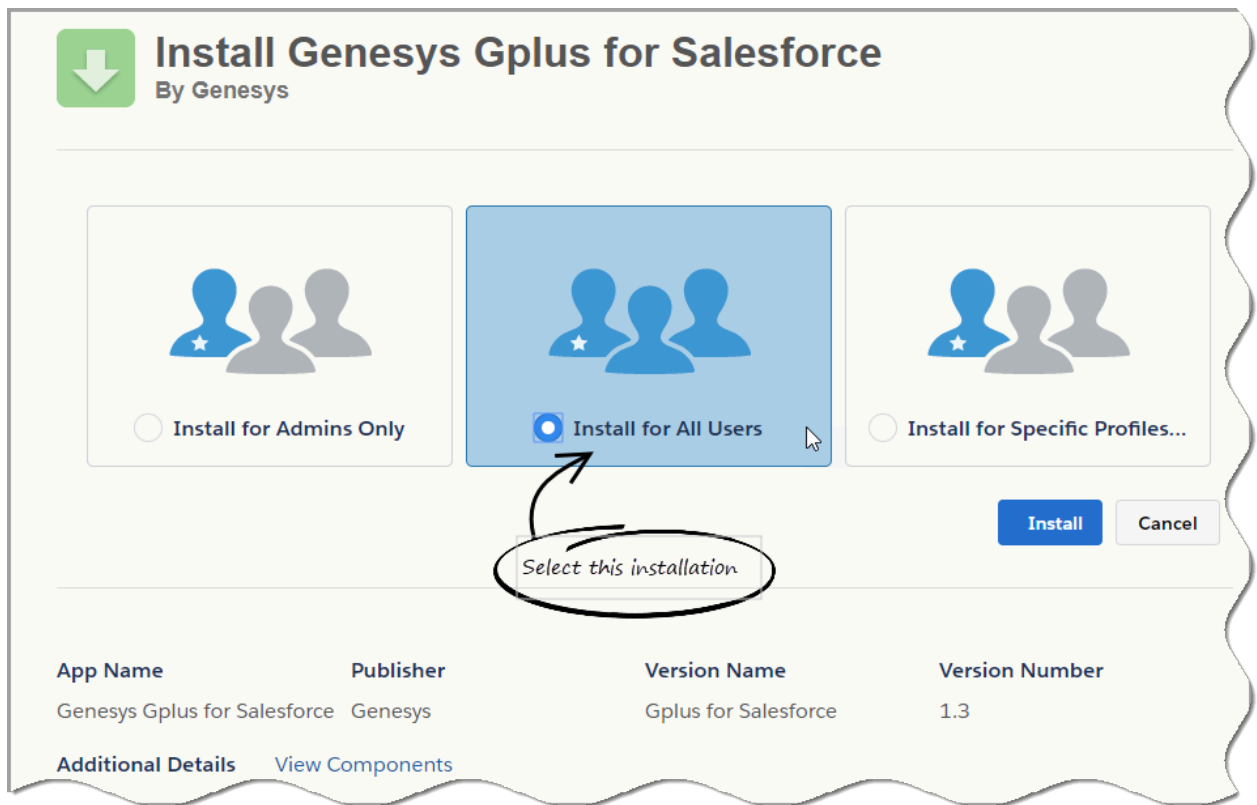
1. If you already have a Salesforce Call Center for Gplus Adapter 8.5, clone the Call Center.
2. Follow the steps in the Configuring Salesforce for Gplus Adapter procedure (skip the *Installing Gplus Adapter in Salesforce Classic* procedure).
3. After you configure your Salesforce Call Center, follow the migration procedure in Migrating to Gplus Adapter (v9).

Installing Gplus Adapter in Salesforce Classic

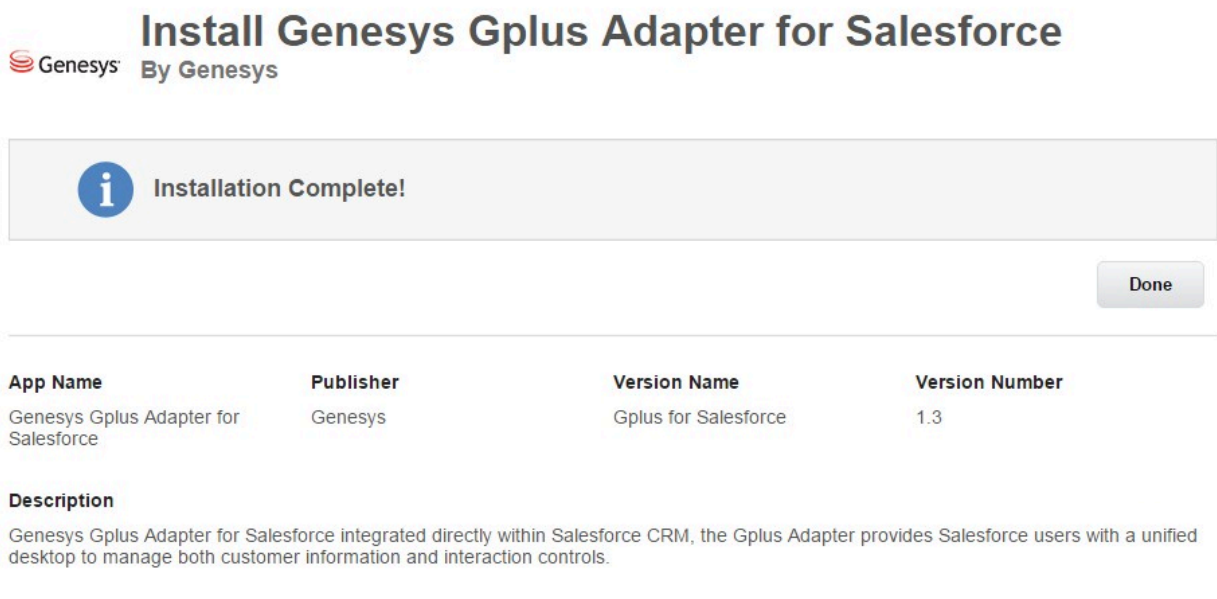
1. Open the following URL to install the latest Genesys Gplus Adapter (v9) for Salesforce package in Salesforce:
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04to0000000C3VD>

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 Gplus Adapter to specific profiles, then you can choose **Install for Specific Profiles** Click **Install**.



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



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	<input type="checkbox"/>	0	0	0	

Uninstalled Packages										
No uninstalled package data archives										

Configuring Salesforce for Gplus Adapter

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 Gplus Adapter in Salesforce Classic.

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://ui/crm-workspace/index.html
```

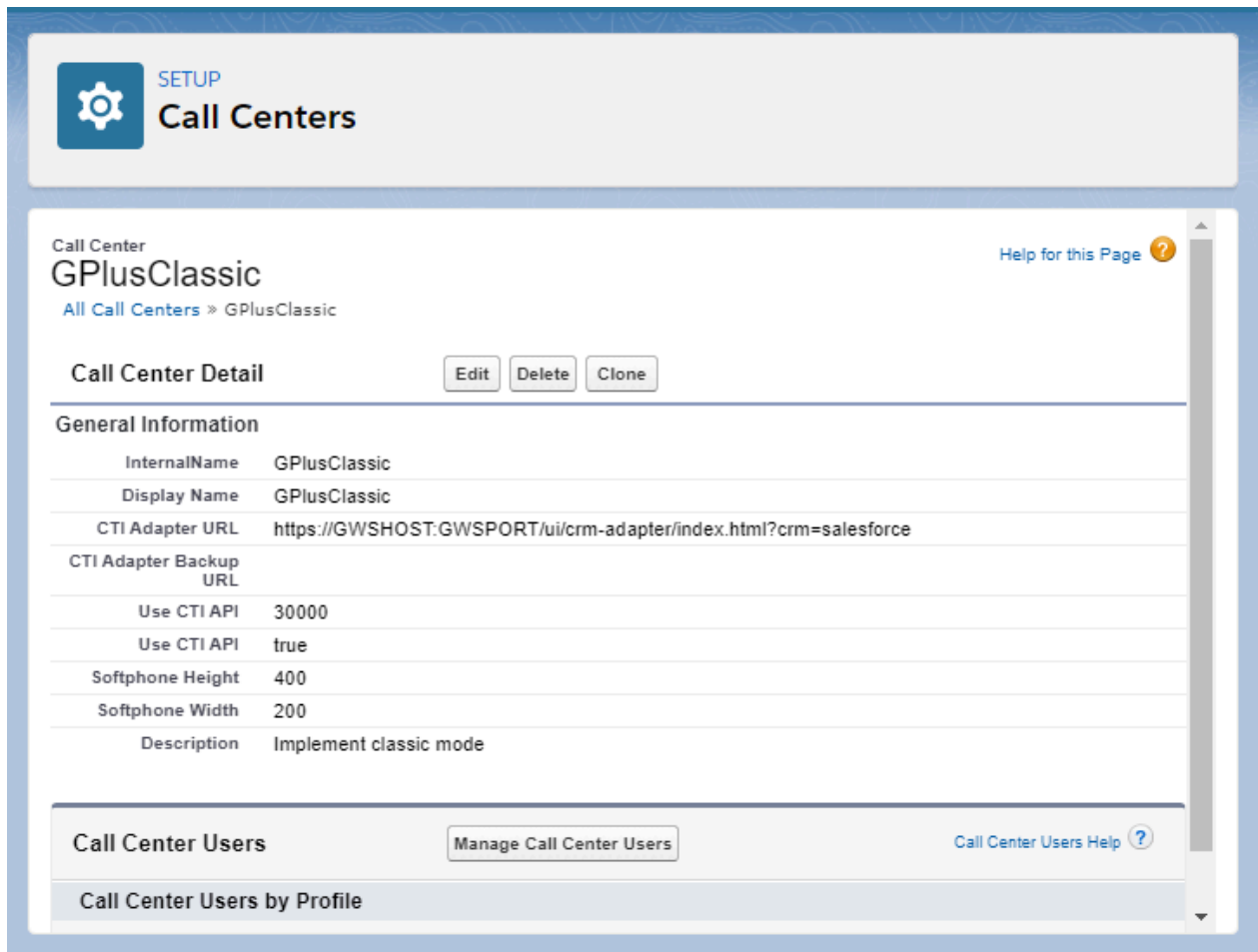
You'll need to change to the correct domain name provided by Genesys. For example:

```
https://gwa-use1.genesyscloud.com/ui/crm-workspace/index.html
```

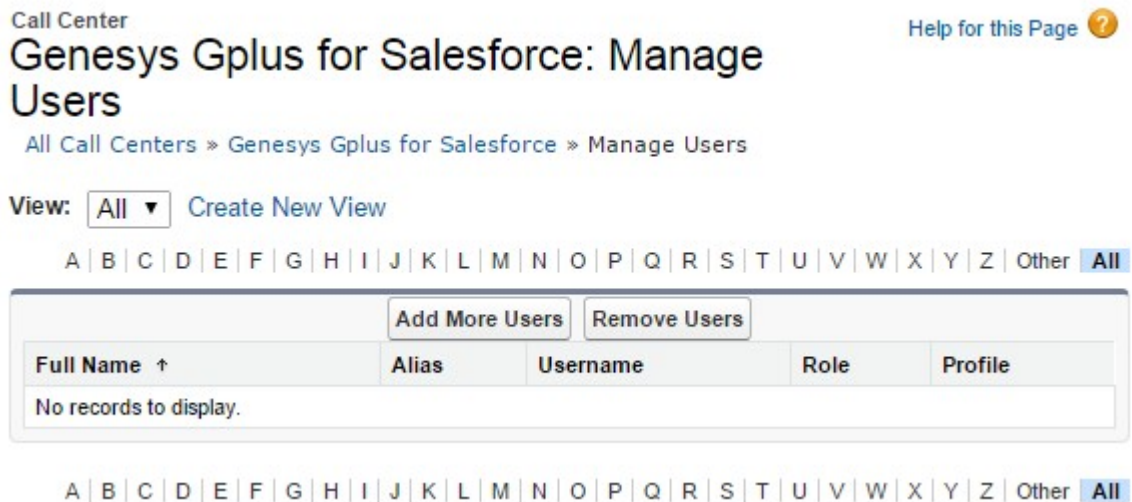
5. To ensure that Gplus Adapter displays correctly, adjust the **Softphone Height** and **Softphone Width** to larger numbers (for example, **450** by **800** pixels).

You should leave the other options at their default values so Gplus Adapter works correctly in Salesforce.

If you ran an upgrade instead of an install, your previous Call Center parameters are preserved.



6. Click **Save**.
7. Click **Manage Call Center Users** and then click **Add users**.



8. 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 Gplus Adapter 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

<input type="checkbox"/>	Full Name	Alias	Username	Role	Profile
<input type="checkbox"/>	Jackson, Helen	hjack	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](#)

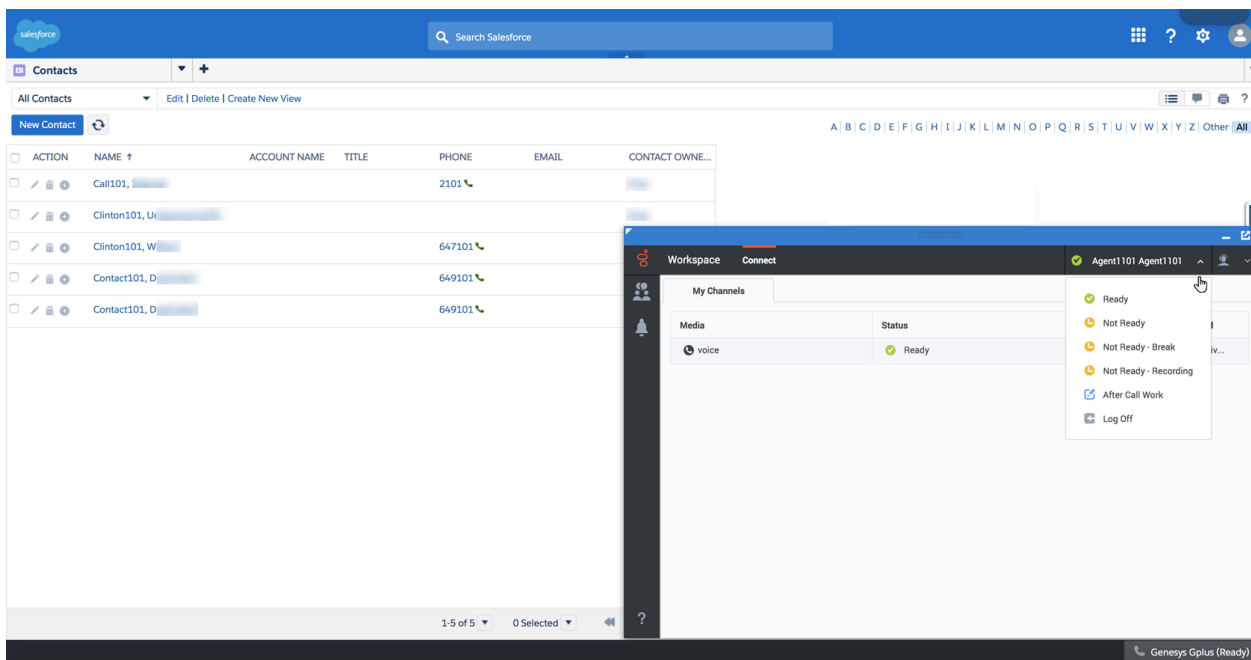
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

[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 Gplus Adapter in Salesforce Console, click the phone icon in the bottom-right corner.



Migrating to Gplus Adapter (v9)

Contents

- [1 Migration procedure](#)

- Administrator

Follow this procedure to migrate your existing Gplus Adapter 8.5 to Gplus Adapter 9.0 for Salesforce.

Related documentation:

-

Migration procedure

Important

You can run Gplus Adapter 8.5 and 9.0 in parallel during the migration testing phase.

Important

Ensure that Agent Workspace release 9 has been enabled in your environment by confirming that the Agent Workspace 9 application icon is displayed in your Genesys Portal

Genesys recommends that you complete steps 1 and 2 in your Salesforce test environment first.

1. Migrate from Gplus Adapter 8.5 to 9.0:
 - a. In a **Salesforce Lightning** environment, follow the steps in Integrating Gplus Adapter in Salesforce Lightning to download the **lightning-callcenter.xml** file, import into the Salesforce Call Centers configuration, and modify the imported Salesforce Call Center.
 - b. In a **Salesforce Classic** environment, follow the Migration steps in Integrating Gplus Adapter in Salesforce Classic.
2. (Optional) Migrate 8.5 configuration option settings to 9.0.
3. Gplus Adapter 9.0 provides single sign-on (SSO) enabled options. If you are migrating Gplus Adapter 8.5 with SSO enabled, or are planning to start using SSO with Gplus Adapter 9.0, refer to Configuring SSO.
4. Add users to the new Salesforce Call Center you just imported and modified. See Adding users to Call Center for more detailed steps for Salesforce Lightning or here for Salesforce Classic. **Tip:** For testing purposes, you can either add a new test user or remove an existing user from the Salesforce Call Center with Gplus 8.5 and add them to the Salesforce Call Center with Gplus 9.0.
5. Test the Gplus Adapter 9.0 functionalities with the new Salesforce Call Center configuration.
6. If you're ready to migrate to the Salesforce production environment, follow the steps below:

- a. Repeat step 1a *or* step 1b for the production Salesforce Call Center.
- b. Remove users from the Salesforce Call Center with Gplus 8.5 and add them to the Salesforce Call Center with Gplus 9.0.

Configuring SSO

Contents

- 1 Gplus Adapter configured with SSO and your own IDP
- 2 Salesforce as SSO and IDP
 - 2.1 Enable Salesforce as an Identity Provider
 - 2.2 Enable SSO on Genesys tenants
 - 2.3 Define Gplus Adapter as a Connected App in Salesforce
 - 2.4 Agent SSO login workflow

- Administrator

You can configure Gplus Adapter to use either your own IDP or Salesforce as an IDP.

Related documentation:

-

You can configure Gplus Adapter to use either your own IDP or Salesforce as an IDP. You can choose one of these two options:

1. **Gplus Adapter configured with SSO and your own Identity Provider (IDP).**
2. **Gplus Adapter integrated with Salesforce SSO as the IDP.**

This option provides an improved experience over the first option.

Gplus Adapter configured with SSO and your own IDP

To configure Gplus Adapter with SSO and your own Identity Provider (IDP), perform the following steps:

- Ensure that SSO for Agent Workspace release 9 has been enabled in your environment by following the instructions in the Agent Setup SSO article and the Single Sign-On article.
- To ensure that your IDP page is not blocked by the browser and successfully opens in the Gplus Adapter iframe, verify your IDP response headers configuration:
 - For the Chrome, Firefox, and Microsoft Edge browsers:

If the IDP server response contains the obsolete **X-Frame-Options** header, consider replacing it with the **Content-Security-Policy** header setting.

For example (Lightning):

```
Content-Security-Policy: frame-ancestors 'self' https://*.genesyscloud.com https://*.lightning.force.com;
```

For example (Classic):

```
Content-Security-Policy: frame-ancestors 'self' https://*.genesyscloud.com https://*.salesforce.com;
```
 - For the Internet Explorer 11 browser:

If IDP server response contains **X-Frame-Options** header, add **ALLOW-FROM URI** to the header setting.

For example (Lightning):

```
X-Frame-Options: ALLOW-FROM https://.genesyscloud.com/ https://.lightning.force.com/;
```

For example (Classic):

```
X-Frame-Options: ALLOW-FROM https://.genesyscloud.com/ https://.salesforce.com/;
```

For more information about Gplus Adapter configuration for IDP, see this Salesforce Knowledge Article.

- Gplus Adapter follows the security rules for iFrame embedded applications in Chrome, Firefox, and Microsoft Edge browsers, if the **SameSite by default cookies** flag in the agent's browser is enabled by default or by the agent and the IDP provider did not set **SameSite=None** for cookies, the agent's IDP login page might get blocked by the browser.

To solve this problem, you must reconfigure the IDP responses so that the **SameSite=None** cookie is present in the IDP response.

If you have your agents' browser configured to treat cookies as **SameSite=Lax** by default, then you likely also have the **Cookie without SameSite must be secure** rule enabled as well. In this case, the cookie from the same IDP must have the **Secure** flag set.

For more information about configuring browser security settings, refer to the documentation for the browsers used by your organization.

- For SSO logout configuration, use the following Agent Setup Desktop Global Login options:
 - **Invalidate Auth SSO session on Workspace logout**
 - **Show Change Account Link**
- Adapter is now ready to use with SSO.

Salesforce as SSO and IDP

You can simplify your agent log in process by integrating Gplus Adapter with Salesforce to use Salesforce as your single sign-on (SSO) identity provider (IDP). This means that your agent only has to provide their Username and Tenant to log in to Gplus Adapter after they have logged into Salesforce using Salesforce as your SSO identity provider.

Follow these steps to set up SSO with Salesforce as the identity provider:

1. Enable Salesforce as an Identity Provider
2. Define Gplus Adapter as a Connected App in Salesforce

Enable Salesforce as an Identity Provider

Prerequisites

- You must have an Admin role in your organization's Salesforce account
- User email address (username) that you use to login to Salesforce. **Note:** Username email addresses must be the same in both Salesforce and Gplus Adapter.

Enable Salesforce as an Identity Provider

1. Follow the steps in the Enable Salesforce as an Identity Provider article in the **Salesforce Help**.
2. In the **Identity Provider** view, click **Download Metadata** to obtain a copy of the IDP metadata XML.

Enable SSO on Genesys tenants

1. Employing SAML for SSO requires two parts, a Service Provider (Genesys Auth Service) and an Identity

Provider (Salesforce). To complete your Service Provider configuration, you must upload the Salesforce Identity Provider IDP-metadata XML file you created in the previous procedure to Agent Setup (refer to the Agent Setup SSO article).

2. Download and open the SP-Metadata XML file in an XML viewer and find the **Location** parameter. You will need this parameter for the Entity ID and the ACS URL when you define Gplus Adapter as a Connected App in Salesforce. The **Location** URL looks something like this: `https://gws-usw1.genhtcc.com/auth/v3/saml/SSO/alias/`.
3. For SSO logout configuration, use the following Agent Setup Desktop Global Login options:
 - **Invalidate Auth SSO session on Workspace logout**
 - **Show Change Account Link**

Salesforce does not take into account configuration of **enforceAuthN** in SAML authentication requests as described in SAML settings.

Define Gplus Adapter as a Connected App in Salesforce

1. To configure a new Connected App follow the instructions in the Salesforce Help Defining Service Providers as SAML-Enabled Connected Apps document.
2. Specify the required fields under **Basic Information**:
 - Connected App Name (for example, Gplus Adapter)
 - API Name (for example, GWS)
 - Contact email (the email address of the Admin user)
3. Under Web App Settings, select **Enable SAML**
4. Use the **Location** string from the SP-Metadata xml file of the Enable Salesforce as an Identity Provider procedure to provide Entity ID and ACS URL:
 - Entity ID: The long string of numbers and letters at the end of the **Location** parameter URL after the last "/".
 - ACS URL: The URL from the **Location** parameter that you obtained from the SP-Metadata in step 2 of the *Enable SSO on Genesys tenants* procedure.

For example (Lightning):

Configuring SSO

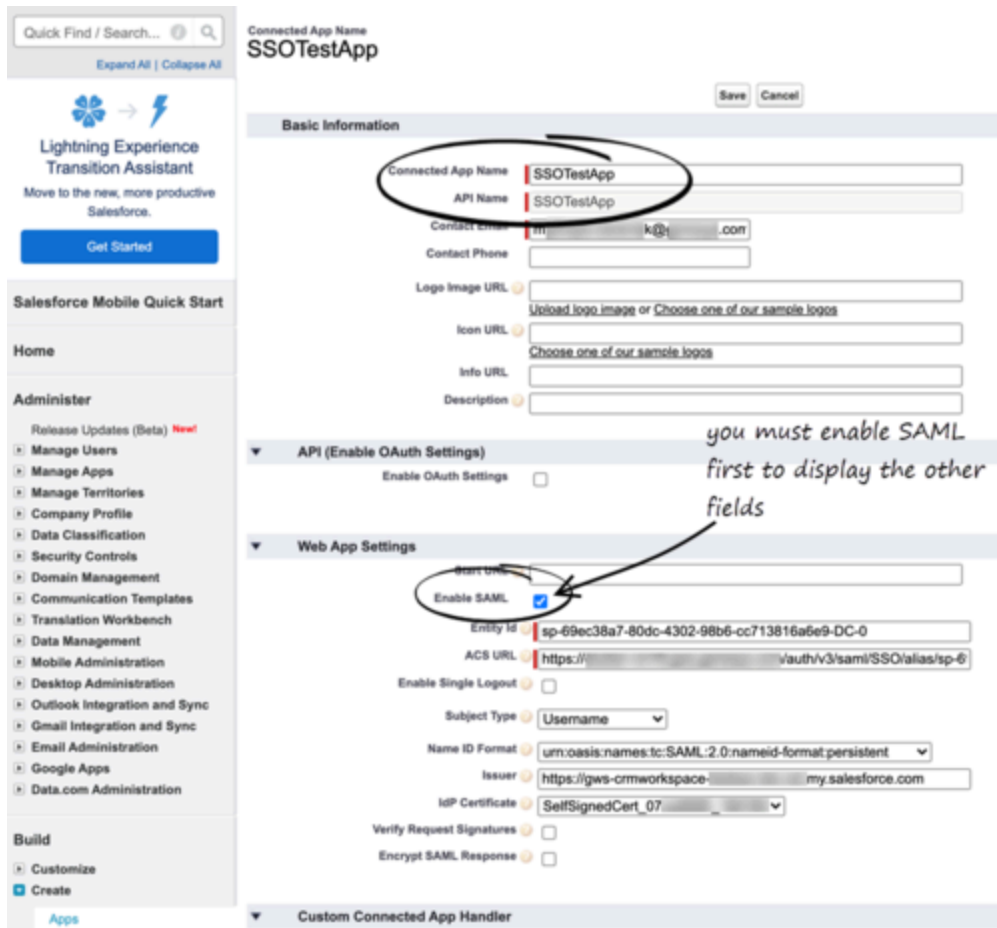
The screenshot shows the Salesforce Setup interface for configuring a Connected App. The left sidebar contains a navigation menu with categories like Data, Apps, Lightning Bolt, Mobile Apps, Salesforce, and Packaging. The main content area is titled 'Manage Connected Apps' and contains several sections:

- Connected App Name:** SSOtestApp (circled in red)
- API Name:** SSOtestApp (circled in red)
- Contact Email:** [redacted]@genesys.com
- Contact Phone:** [redacted]
- Logo Image URL:** Upload logo image or Choose one of our sample logos
- Icon URL:** Choose one of our sample logos
- Info URL:** Choose one of our sample logos
- Description:** [redacted]

Below these fields are two expandable sections:

- API (Enable OAuth Settings):** Includes a checkbox for 'Enable OAuth Settings' which is currently unchecked.
- Web App Settings:** Includes a checkbox for 'Enable SAML' which is checked. A handwritten note with an arrow points to this checkbox, stating: "you must enable SAML first to display the other fields". Other fields in this section include ACS URL, Single Logout URL, Single Logout Binding (set to HTTP Redirect), Subject Type (set to Username), Name ID Format, Issuer, SFP Certificate, and checkboxes for 'Verify Request Signatures' and 'Encrypt SAML Response'.

For example (Classic):



5. Use the identity provider event log to troubleshoot errors when trying to log in to Gplus Adapter.

Agent SSO login workflow

This is the general workflow when Gplus Adapter initiates the login process and uses Salesforce to identify the user:

1. An agent logs in to Salesforce.
2. The agent provides their Username and Tenant name in Gplus Adapter and clicks **Next**.
3. GPlus Adapter sends a request to Salesforce to authenticate the user.
4. Salesforce identifies the agent specified in the request and sends an authentication response.
5. Gplus Adapter authenticates the response sent by Salesforce.
6. If the agent is authenticated, they are logged in to Gplus Adapter while logged in to Salesforce.

Useful links

- [Salesforce guide](#)

- [Video example from Salesforce](#)

Configuring and Using General Features

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- [1 Configuring Gplus to run Salesforce Apex](#)
- [2 Support for Smart Failover](#)
 - [2.1 Configuring Smart Failover for Gplus Adapter for Salesforce](#)
- [3 Agent Status Display in Gplus Adapter](#)
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- [5 Interaction Events causing the Adapter window to Maximize](#)
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- [7 Using Gplus Adapter in multiple browser tabs](#)
- [8 Load Gplus Adapter in only one browser tab](#)
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- Administrator

Gplus Adapter integrates Genesys interaction handling capabilities into Salesforce. The Adapter window is accessed through the Adapter button in the Salesforce Utility Bar. The Adapter window displays agent status at all times. The Adapter window can be docked, undocked, moved, resized, minimized, and maximized. Some Genesys interactions events cause the Adapter window to be maximized automatically.

Related documentation:

-

Important

The information about support for Service Client API in Salesforce has moved here: [Gplus Adapter support for Service Client API](#).

Configuring Gplus to run Salesforce Apex

If you want to customize Salesforce by running Salesforce Apex on Genesys interaction events, you can configure Gplus Adapter to create and execute Salesforce Apex. See the [Salesforce Apex Developer Guide](#).

Apex can be initiated by the following Genesys interaction events:

Genesys Workspace Web Edition events initiating Run Apex

Name	Description
Voice channel events	
RINGING	Inbound call is ringing.
DIALING	Outbound call is ringing
ESTABLISHED	Call is established
RELEASED	Call is released
Digital channels events	
INVITED	Digital interaction invitation received
ACCEPTED	Digital interaction is accepted
CREATED	Digital interaction is created
REMOVED	Digital interaction is removed

Your Apex class should have one method and accept the following two string parameters: eventName and eventData.

For example:

```
public class tstapex {
    public void eventCollector (string eventName, string eventData) {
        String data;
        Map interaction =(Map)JSON.deserializeUntyped(eventData);
        if (eventName == 'RINGING'){
            data=(String)interaction.get('key1');
        }
        if (eventName == 'DIALING'){
            data=(String)interaction.get('key2');
        }
        if (eventName == 'ESTABLISHED'){
            data=(String)interaction.get('key3');
        }
        if (eventName == 'RELEASED'){
            data=(String)interaction.get('key4');
        }

        if (eventName == 'INVITED'){
            data=(String)interaction.get('key5');
        }
        if (eventName == 'ACCEPTED'){
            data=(String)interaction.get('key6');
        }
        if (eventName == 'CREATED'){
            data=(String)interaction.get('key7');
        }
        if (eventName == 'REMOVED'){
            data=(String)interaction.get('key7');
        }
        }

        data=EncodingUtil.urlDecode(data, 'UTF-8');
        Case c = new Case();
        c.Type = 'ICM';
        c.Origin = 'SHIP';
        c.Status = 'New';
        c.Subject = eventName;
        c.Description = data;
        Insert c;
    }
}
```

Examples of how to use the Run Salesforce Apex on interaction events functionality include:

- Provide Salesforce Alerts to an agent for reminders about how to handle a workflow in Salesforce.
- Link a newly created Salesforce Case record to the existing (Account, Contact, and so on) record.

Configure which events you want to trigger runApex code by using the **Run Salesforce Apex on Interaction Events** option in Agent Setup.

Configure the name of the custom Apex Class to execute by using the **Apex Class Name** option in Agent Setup.

Gplus Adapter can send a list of interaction userData key-value pairs (KVPs) to Salesforce Apex for the specified interaction event. To specify the list of userData key names for voice interactions, configure the **Apex Data** option in Agent Setup. To specify the event that triggers Salesforce Apex for digital channel interactions, specify the value by configuring the **salesforce.run-apex.events** option in the Agent Annex in Agent Setup. Specify one of the following values: INVITED, ACCEPTED,

CREATED, or REMOVED.

This feature depends on the **Run Salesforce Apex on Interaction Events** option being enabled in Agent Setup. When the specified event, such as RINGING, occurs, Gplus Adapter collects the userData KVPs and sends them to the Apex class specified by the **Apex Class Name** option.

When you configure **Apex Data**, ensure that the key names that you specify exist in the interaction userData; Gplus Adapter skips non-existent key names. To avoid this situation, either add the key name to the userData, remove non-existent key names from the option, or ensure that Apex properly processes non-existent key names. If an empty list is specified for the value of **Apex Data**, the original interaction object data is sent to the Apex **eventData** parameter.

Support for Smart Failover

Gplus Adapter supports Genesys Smart Failover for disaster recovery scenarios. This feature enables you to switch agents automatically to a backup URL configured in Salesforce in the event that the primary URL is inaccessible. After Smart Failover has been configured in Genesys Web Services, configure Smart Failover in your Salesforce deployment.

The Gplus Adapter for Salesforce Agent Guide contains information about the agent experience during Smart Failover scenarios.

If Adapter cannot establish connection to Genesys data center on the primary URL after the configured timeout (Use CTI API) expires, Adapter will attempt to load from the backup URL (CTI Adapter Backup URL). After Adapter loads, Genesys Smart Failover handles disaster recovery events.

Configuring Smart Failover for Gplus Adapter for Salesforce

To perform the following procedure, you need to set up a new call center using an XML file that Genesys provides to you.

The screenshot shows the Salesforce Admin interface for configuring a Call Center. The left sidebar contains a search bar with 'Call Center' and a navigation menu with 'Feature Settings', 'Service', 'Call Center', 'Call Centers', 'Directory Numbers', and 'Softphone Layouts'. The main content area is titled 'SETUP Call Centers' and shows the configuration for 'DRCallCenter'. Below the title are 'Edit', 'Delete', and 'Clone' buttons. A 'General Information' table lists various settings for the call center.

General Information	
InternalName	DRCallCenter
Display Name	DRCallCenter
CTI Adapter URL	https://gwa-usw1.genesyscloud.com/ui/crm-workspace/index.html?site-1=gwa-use1.genesyscloud.com
CTI Adapter Backup URL	https://gwa-use1.genesyscloud.com/ui/crm-workspace/index.html?site-1=gwa-usw1.genesyscloud.com
Timeout	30000
Use CTI API	true
Softphone Height	450
Softphone Width	800
Description	CRM Disaster Recovery
Salesforce Compatibility Mode	Lightning

Before you begin, ensure that you have:

- A Salesforce administrator role account
- The DR-lightning-callcenter.xml file
- Host and port information required to specify call center settings. Genesys provides this information to you.

Start

1. Get the DR-lightning-callcenter.xml file from Genesys and save to a local folder.
2. Log into Salesforce.com with your administrator credentials to open the **Home** page.
3. Select **Setup**.
4. In the **Quick Find** field, type Call Center.
5. Click **Call Centers**.
6. Click **Import**.
7. Click **Choose File** and navigate to the folder where you saved the DR-lightning-callcenter.xml file.
8. Click **Import**.
9. Click **Edit** and fill in the **CTI Adapter URL** and **CTI Adapter Backup URL** that Genesys provided to you. Refer to the screen shot for an example of what a configuration looks like. When you paste the URLs that Genesys gives you, add the following parameters to **CTI Adapter URL**: `?site-1= from Backup URL`

Here is an example (**NOTE**: the URLs in your environment will be different):

- **CTI Adapter URL**: `https://gwa-usw1.genesyscloud.com/ui/crm-workspace/index.html?site-1=gwa-use1.genesyscloud.com`
- **CTI Adapter Backup URL**
`https://gwa-use1.genesyscloud.com/ui/crm-workspace/index.html?site-1=gwa-usw1.genesyscloud.com`

(reqStandbyUrl) - Represents the location that hosts the backup Adapter URL. The backup Adapter is used after the timeout period has elapsed for the primary Adapter and the **notifyInitializationComplete()** for Salesforce method hasn't been called within the required timeout period. When you specify a backup URL, also specify the timeout value in the **Use CTI API** field.

- **Use CTI API**: 30000 (default)

(reqTimeout) - Represents the time in milliseconds after which the backup URL is used to load Adapter. When you specify a required timeout, also specify the Adapter backup URL in the **CTI Adapter Backup URL** field.

10. After you add your disaster recovery call center, you must provision the call center with users. If you have a previous Salesforce Call Center, remove users from that Call Center and add the users to the new call center you just added.

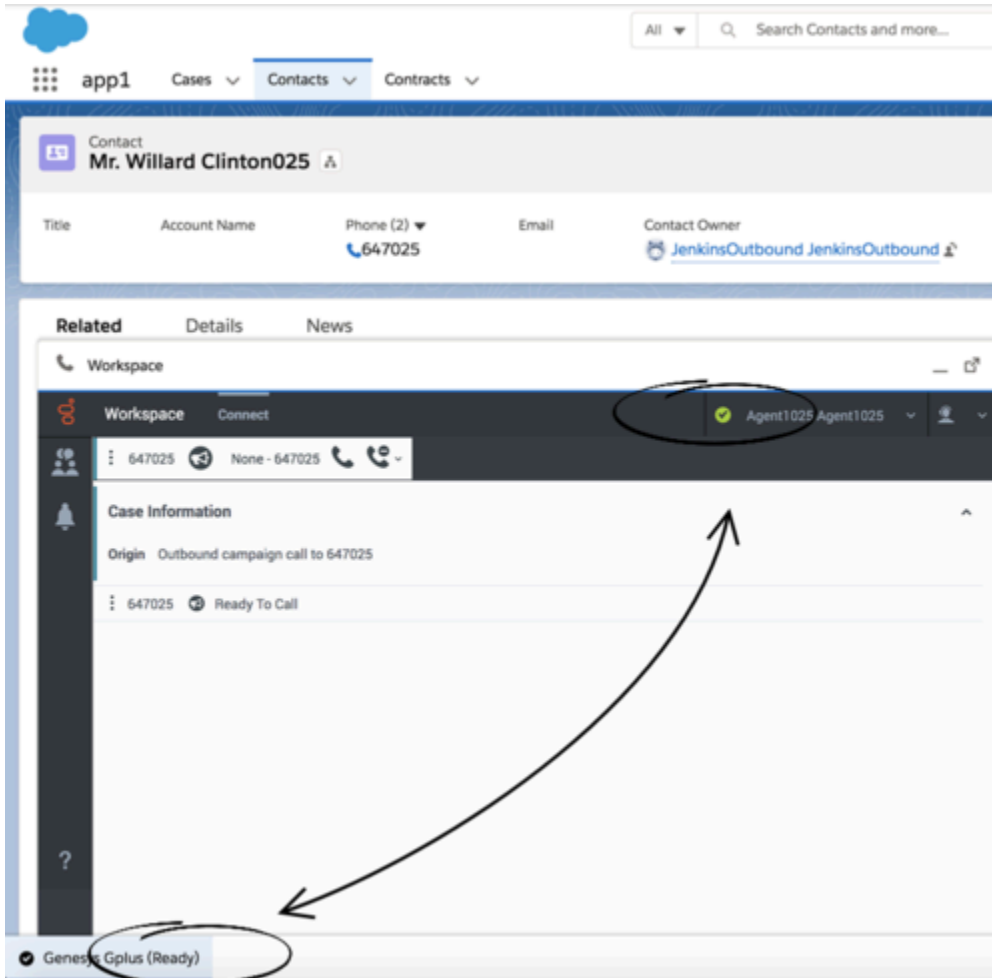
End

Agent Status Display in Gplus Adapter

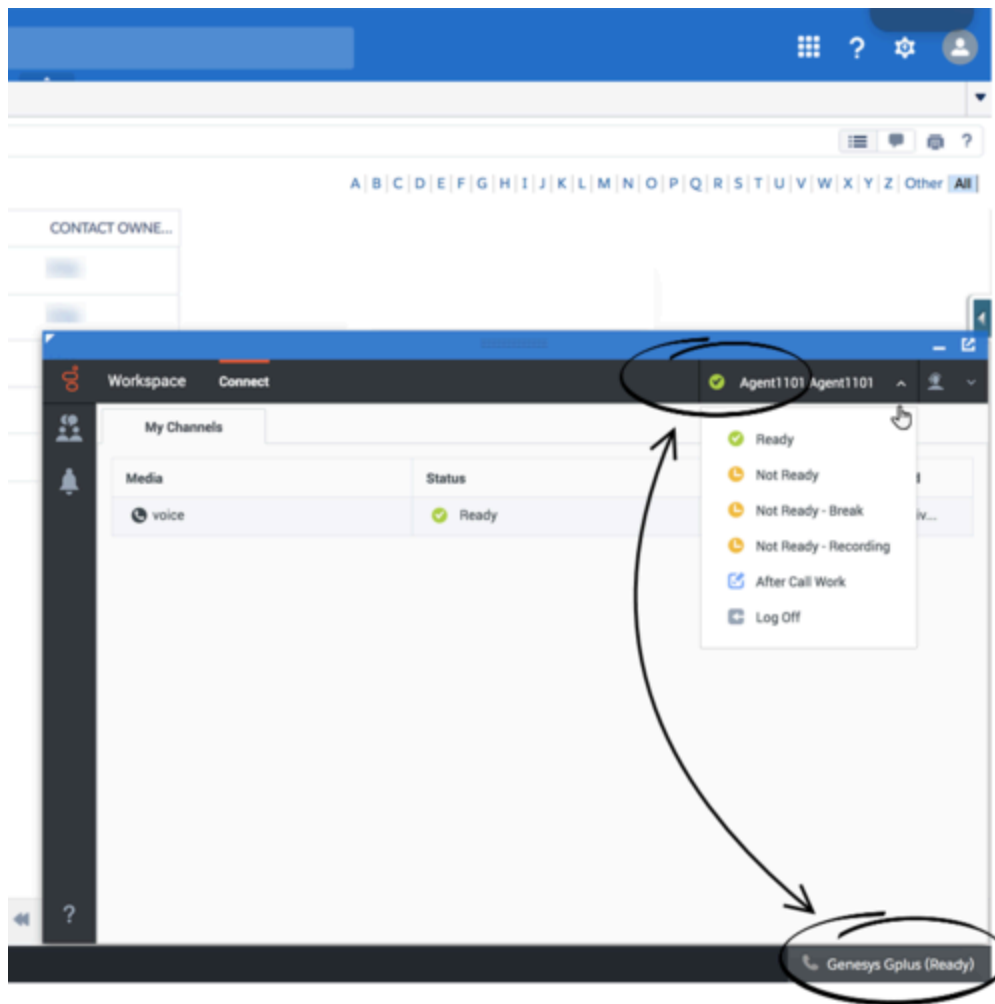
Gplus Adapter displays agent status in the Utility Bar whether the Adapter window is minimized or

maximized. Agent status is obtained from Agent Workspace. This feature enables agents to monitor their status even when the Adapter window is minimized.

Agent status in Lightning:





Agent status in Classic:



Dock, undock, move, and resize Adapter

By default, the Adapter window launches in the bottom-left corner in the Salesforce Utility Bar (bottom-right corner in Classic).

Agents can undock the Adapter window then move it to a different location. To undock (pop out) the window, they click the  icon in the top-right corner of the Adapter window and drag it where they want to place it. Once the window is undocked, agents can move or resize the window as needed.

Agents can dock (restore) the window back to its original position by clicking the  icon.

Interaction Events causing the Adapter window to Maximize

If an agent has minimized Adapter to handle other tasks in Salesforce, the Adapter window is automatically maximized by the following events:

- Receiving voice, chat, SMS, email, or workitem interactions
- Releasing interactions
- Marking Done interactions
- Receiving connections error notifications
- Receiving confirmation that an interaction has been added to the Genesys Universal Contact Server (UCS) database

Note: If an agent receives an SMS from an unassigned contact in the **Communication** tab, the Agent Workspace window will be maximize if it was minimized on SMS invite; however, if the contact in the **Communication** tab is assigned, no action occurs.

Activity timeout

Gplus Adapter logs an agent out if there has been a period of inactivity. Use the **Keep Alive Sync** option to prevent the agent from being logged out of Salesforce when there is no activity in Salesforce beyond the configured time period. If enabled, Adapter refreshes the Salesforce session at short intervals and keeps the Adapter-Salesforce session alive. If the browser with Gplus Adapter loaded or the agent's device becomes idle, Keep Alive functionality also becomes idle.

Using Gplus Adapter in multiple browser tabs

Agents can use Gplus Adapter in multiple browser tabs. The following describes how the main Gplus Adapter functions are supported in multiple browser tabs:

- **Click-to-dial:** If an agent clicks-to-dial in one Salesforce browser tab, an outbound call is initiated in Adapter in all browser tabs. The agent can continue to handle the interaction in any open browser tab.
- **Screen pop:** By default the screen pop is displayed in all browser tabs that are running Gplus Adapter. Screen pop FLOW, screen pop NEW_RECORD_MODAL, and creation and screen pop of new Salesforce record are triggered only in the active tab (refer to Screen pop by Salesforce object type).
- **Activity history:** The activity history on interaction Mark Done or Salesforce screen pop is created once for each interaction irrespective of how many browser tabs are running Gplus Adapter.
- **Run Apex:** If you have configured Salesforce Run Apex, calls to Run Apex occur in the active browser tab.

Genesys recommends logging in to Adapter in the first browser tab before opening Gplus Adapter in multiple tabs. Before using Adapter in any open browser tab or opening Adapter in a new tab, make sure that Adapter has finished operations in your active page and is fully loaded. Refer to the Agent Workspace Agent Help for more information.

Load Gplus Adapter in only one browser tab

If the user opens Salesforce in multiple browser tabs, Gplus Adapter, by default, automatically loads into each browser tab. If you want Gplus Adapter to open only in one of the browser tabs running Salesforce, enable the **Prevent Gplus in Browser Multitab** option in Agent Setup to prevent Gplus Adapter from opening in multiple browser tabs.

Salesforce Shield Platform Encryption support

Gplus Adapter supports Salesforce Shield Platform Encryption. Gplus Adapter works with encrypted Salesforce record fields, such as in the following scenarios:

- Searching Salesforce data for screen pop with record ID, custom fields, or standard fields.
- Adding data to Salesforce, such as when creating new objects on screen pop or creating Activity Tasks on mark done.
- Updating Salesforce data when an Activity Task is updated after creation or after mark done.

Salesforce Shield Platform Encryption is also supported when you add your own code to a Flow or to run Apex triggered by Adapter, including code that contains functionality that works with the Salesforce database.

Support for Genesys Softphone

Gplus Adapter functionality supports calls established through Genesys Softphone in Connector mode.

Support for Genesys Interaction Recording

The Gplus Adapter console supports Genesys Interaction Recording (GIR). For an overview of Genesys Interaction Recording, see [About Genesys Interaction Recording](#).

Genesys Interaction Recording is only supported for Voice channel and is not supported when Gplus Adapter is popped out of the Salesforce window.

To configure Genesys Interaction Recording for the Gplus Adapter, see [Enable Screen Recording in the Genesys Interaction Recording Solution Guide](#). In this procedure, refer to the [Integrating with Workspace Web Edition](#) section.

To manage the call recording features of an agent, see [Recording setup](#).

Integrating Genesys Universal Contact Server (UCS)

You can enable agents to use Team Communicator to call a contact that is stored in the Universal Contact Server (UCS). You can view the detailed contact information from the **Contacts** tab. For more information, see [Configure global login](#).

Support for browser-based WebRTC calling

Gplus Adapter supports browser-based WebRTC voice calling. Enable this feature by configuring the WebRTC options in the **Voice** section in Agent Setup.

Support for Supervisor functions

Gplus Adapter supports supervisor monitoring, coaching, and barging-in of calls handled by agents. While supervisors are performing these functions, the Gplus Adapter features such as Screen Pop occur only on the supervised agent's Gplus Adapter.

Click-to-Dial

Contents

- [1 Preprocessing rules for international dialing](#)
- [2 Gplus Adapter integration with Salesforce High Velocity Sales](#)

- Administrator

Click-to-dial enables agents to dial a phone number directly from Salesforce phone fields. Based on the pre-processing rules defined in Agent Setup, Adapter formats the selected phone number and then dials it. These configurations are often helpful while dialing an international number. Agents see the formatted phone number in the screen pop.

Related documentation:

-

Gplus Adapter can enable the Click-to-Dial feature in Salesforce. Use the **Click to Dial** option in Agent Setup to enable or disable Gplus Adapter click-to-dial regardless of whether Click-to-Dial is enabled in Salesforce.

Preprocessing rules for international dialing

Gplus Adapter can apply custom preprocessing rules that you define on click-to-dial requests to adjust the format of phone numbers or Automatic_Number_Identification for international dialing.

For international numbers, Gplus Adapter uses the preprocessing rules you set up to evaluate the phone number it receives from Salesforce to determine if a prefix should be added before making the dial request. This is helpful when local numbers are stored in Salesforce records, but dialing prefixes are required to dial the call. Configure preprocessing rules by using the **Click to Dial Preprocessing Rules** setting in Agent Setup. For example, you can configure a preprocessing rule to add a "+1" prefix to the phone number being dialed.

Choose one of these settings:

- **None:** By default no phone number preprocessing rule is applied.
- **Default:** The default preprocessing rules are as follows:
 - 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.
- **Add...:** Name and define your own preprocessing rule. Each preprocessing rule is defined by the four following parameters:
 - **Display Name:** The name of the preprocessing rule.
 - **RegEx:** 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:

- **Display Name:** preprocessing-rule-10-digit-US-numbers
- **RegEx:** `^[0-9]{10}$`
- **Prefix:** +1
- **Description:** If the number has 10 digits, add +1.
- **Display Name:** preprocessing-rule-11-digit-US-numbers
- **RegEx:** `^[0-9]{11}$`
- **Prefix:** +
- **Description:** If the number has 11 digits, add +.
- **Display Name:** preprocessing-rule-international-numbers
- **RegEx:** `^(?!011)[0-9]{8,}$`
- **Prefix:** 011
- **Description:** If the number has more than 11 digits and does not start with 011, add 011

Important

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

Gplus Adapter integration with Salesforce High Velocity Sales

[Link to video](#)

Gplus Adapter supports Salesforce Sales Cadence in Salesforce High Velocity Sales (HVS). In Salesforce Lightning, you must first enable HVS and setup Salesforce Cadences and Branch Steps, including defining Call Results for branching in Salesforce.

Users use click-to-dial on a Salesforce object to initiate the call workflow in a Salesforce Sales Cadence and handle the call in Gplus Adapter.

While handling an interaction, users must select the Disposition Code in Gplus Adapter that matches the Salesforce Call Result. The names of Call Results in the Salesforce Sales Cadence must *exactly* match the name of the Genesys Multicloud CX Disposition Codes to initiate branching in the Sales Cadence.

The video presents an example of how to integrate Gplus Adapter with Salesforce HVS.

Screen Pop

Contents

- [1 Set up screen pops in Salesforce](#)
- [2 Gplus Adapter screen pops](#)
 - [2.1 Search for records using a Regular Expression](#)
- [3 Screen pop for Voice](#)
 - [3.1 Screen pop for Outbound calls on Dialing and Established](#)
- [4 Screen pop for Chat and SMS](#)
- [5 Screen pop for Email](#)
- [6 Screen pop for Open Media \(workitems\)](#)
- [7 Screen pops for conference or transfer interactions](#)
- [8 Create a new Salesforce record on screen pop](#)
- [9 Link new Salesforce record to an existing record](#)
 - [9.1 Creating a Lookup relationship](#)
- [10 Attached data](#)
- [11 Screen pop by Salesforce object type](#)
- [12 Integrating Genesys Universal Contact Server \(UCS\)](#)
- [13 Screen pop search and process diagrams](#)

- Administrator

Screen pop displays a relevant record or a search results list from Salesforce to support agents when they are handling interactions.

Related documentation:

-

You can set up how you want Adapter to select the screen pop record from Salesforce for different type of interactions.

This process involves:

- Setting up screen pops in Salesforce
- Setting up how and when Gplus Adapter screen pops

Set up screen pops in Salesforce

To set up this functionality in Salesforce, login and go to **Setup > Call Center > SoftPhone Layouts** to create a SoftPhone Layout. Check out the Salesforce documentation for details about configuration.

When you set up a SoftPhone Layout for Adapter, the Gplus Adapter for Salesforce ignores the SoftPhone Layout settings that control call-related fields. Instead, Adapter gets this information from case and toast data you configure in the Genesys environment.

Important

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.

Gplus Adapter screen pops

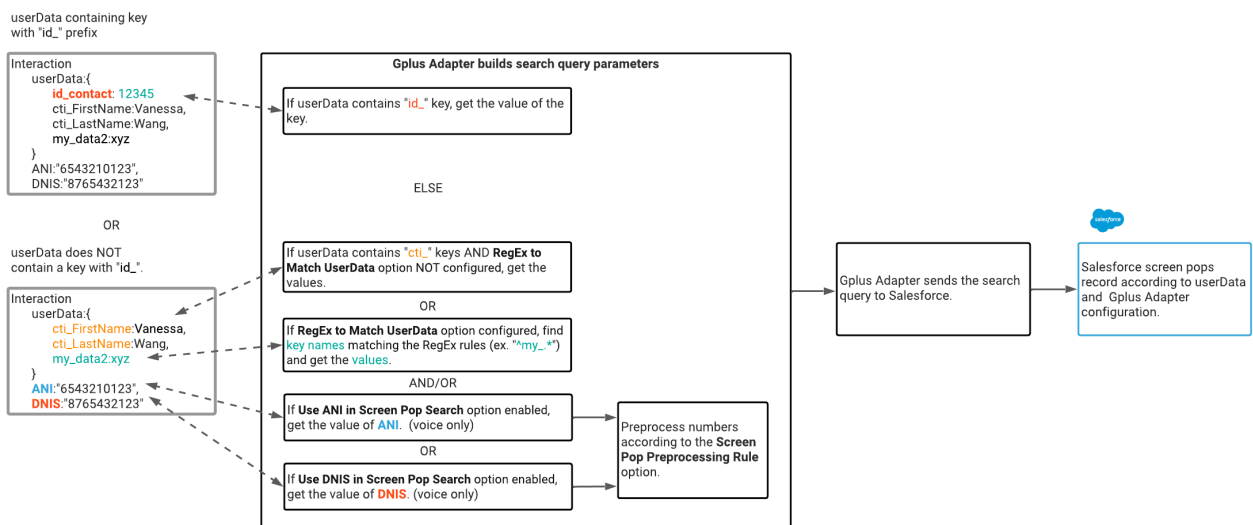
Gplus Adapter can retrieve and screen pop Salesforce records for calls, chats, SMS, emails, and open media interactions. You can configure how Adapter displays a screen pop when a call or chat (including SMS) is transferred or merged in a conference.

Important

To modify the interaction **userData** keyname, use Genesys Designer.

Gplus Adapter uses the interaction **userData** key value to search for matching records in Salesforce. Gplus Adapter only reads the **userData** KVP (key-value pair).

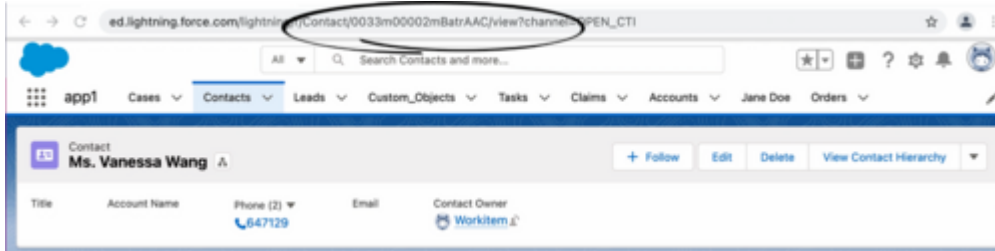
Before you proceed with selecting the screen pop settings, get familiar with how screen pop records are selected and displayed to an agent. This section helps you understand how Adapter finds the matching Salesforce record to screen pop. Review the diagram and accompanying video for a summary of the screen pop search process.



Link to video

Here's the logic Gplus Adapter uses to determine what to send to Salesforce to request Salesforce to display a screen pop of an SUBJECT object type based on the **userData** keys for an interaction:

1. Find the first **userData** keyname with the **id_** prefix and request a screen pop based on the key-value. The Salesforce record ID is included in the record URL.



2. Otherwise, combine values based on the following conditions:

- Find the keys with the **cti_** prefix, such as "cti_FirstName" or "cti_PhoneNumber", and request a screen pop based on the key-values.
- If the **RegEx to Match UserData** setting is configured, Adapter applies a regular expression (RegEx) to match userData key-names. Refer to Search for records using a Regular Expression.
- For voice calls:
 - If the **Use ANI in Screen Pop Search** setting is selected (selected by default), Adapter finds the originating phone number by the Automatic Number Identification (ANI) value and requests a screen pop based on the **ANI**.
 - If the **Use DNIS in Screen Pop Search** setting is selected (de-selected by default), Adapter finds the dialed number from the Dialed Number Identification Service (DNIS) value and request a screen pop based on the **DNIS**.

These two options depend on the **Screen Pop Preprocessing Rule** setting in Agent Setup. Use this option to adjust the format of phone numbers (DNIS) and Automatic Number Identification (ANI) to search for on screen pop. Choose one of these settings:

- **None:** By default, no phone number preprocessing rule is applied.
- **Default:** The default preprocessing rule removes "+1" from the beginning of the ANI or DNIS.
- **Add...:** Name and define your own preprocessing rule. These four parameters define each preprocessing rule:
 - **Display Name:** The name of the pre-processing rule.
 - **RegEx:** A RegEx defining the condition to be matched.
 - **Replacement:** The string to replace the matched string.
 - **Description:** A short description of the rule

Here are some examples of preprocessing rules that you can define:

- **Remove the prefix and use only 9 digits from the phone number**
 - **Display Name:** Use only last 9 digits
 - **RegEx:** `^\.*([0-9]{9})$`
 - **Replacement:** `$1`
 - **Description:** Remove the prefix and use only 9 digits from the phone number.
- **Remove the country code prefix**
 - **Display Name:** Remove country code
 - **RegEx:** `(\+1|\+33|\+91)(.*)$`
 - **Replacement:** `$2`
 - **Description:** Remove the country code prefix.

Search for records using a Regular Expression

You can use regular expressions (RegEx) to specify how Gplus Adapter finds key names in the userData and returns the key value. The RegEx is applied to the ID and search fields that Adapter uses to match screen pop userData keys.

Select and configure the **RegEx to Match UserData** option. This option only changes the criteria by which userData keys are matched. The existing logic and order between ID-based screen pop and

Screen Pop

search are the same (see the bullet points above).

You can specify RegEx search strings to search through the userData key names for specific patterns or letters and numbers such as in this example of userData input:

```
userData: {
  userDataKeyname1: "keyvalue1",
  userDataKeyname2: "keyvalue2",
  userDataKeyname3: "keyvalue3",
  userDataKeyname4: "keyvalue4",
  userDataKeyname5: "keyvalue5",
  userDataKeyname6: "keyvalue6"
}
```

You can use RegEx to search through the userData to return the key value from the userData for "userDataKeyname5 **or** userDataKeyname6". The RegEx you enter in Agent Setup for this example would be: **UserDataKeyname5|UserDataKeyname6**.

RegEx to Match UserData

UserDataKeyname5|UserDataKeyname6

With the example userData input above, Adapter would return the key values **keyvalue5** and **keyvalue6**:

Regular expressions (RegEx) are sequences of characters (strings) that define a search pattern. There are many RegEx cheat sheets available on the internet to help you understand how to construct a search pattern using the special RegEx control characters such as: [,], +, :, \, /, , =, -, _, *, ?, {, }, and so on.

The **RegEx to Match UserData** option does not support RegEx flags, such as: i, g, s, m, y, and u. For example, use "Hello" to search for this string rather than /Hello/ig.

If you use the regular expression options to match your own ID key, ensure that the **Object ID UserData Key** option is set to **id_transfer_object**. This setting ensures that screen pop works with in-focus page transfers.

For information about troubleshooting Gplus Adapter for Salesforce, refer to Troubleshooting Gplus Adapter Integration with Salesforce.

Screen pop for Voice

When an agent receives an external call, Adapter initiates a screen pop that causes Salesforce to show an appropriate record for the caller. By default, Adapter initiates the screen pop when the call is established. To initiate a screen pop when the call is ringing instead, select the **Screen Pop on Ringing** setting .

Important

You can also select screen pops for internal calls with the **Screen Pop For Internal Calls** setting and consult calls with the **Enable Screen Pop For Consult** setting.

For Outbound campaign calls, the screen pop appears immediately after the agent clicks **Get Record** when the notification is displayed. An agent can then choose to make or decline the Outbound campaign call. For Push Preview campaigns, the screen pop appears after the agent clicks **Accept**. For more information about setting up outbound campaigns, and case and toast data, see Outbound channel options.

Screen pop for Outbound calls on Dialing and Established

You can configure Adapter to screen pop a new or existing Salesforce record when an agent dials an outbound call to an external or internal number. You can also choose whether to screen pop when the agent dials the call or when the call is established.

To enable this feature, configure the **Screen Pop for Outbound Calls** option in Agent Setup.

To specify how to search for an existing Salesforce record, configure the following options in Agent Setup:

- **Use DNIS in Screen Pop Search**
- **Use ANI in Screen Pop Search:** To remove the call number from the search, clear this option.
- **RegEx to Match UserData**

Screen pop for Chat and SMS

You can configure Adapter to initiate a screen pop when an agent receives a chat or SMS invite from a contact by selecting the **Screen Pop On Chat Invite** setting.

- When selected, Adapter displays the screen pop on chat or SMS invite.
- When not selected or if the option is not available, Adapter displays the screen pop only when the agent accepts the chat or SMS interaction invitation.

For SMS, the screen pop appears only for an unassigned contact. If the contact is already assigned to the agent in the Agent Workspace **Communication** tab, no screen-pop is displayed.

Screen pop for Email

You can configure Adapter to initiate a screen pop when an agent receives an email invite from a

contact by selecting the **Screen Pop On Email Invite** setting.

- When selected, Adapter displays the screen pop on email invite.
- When not selected or if the option is not available, Adapter displays the screen pop only when the agent accepts the invitation for the email interaction.

You can configure Adapter to initiate a screen pop when an agent replies to an inbound email or creates an outgoing email by selecting the **Screen Pop on Outbound Email Create** setting.

- When selected, Adapter displays the screen pop on email create and email reply create.
- When not selected or if the option is not available, Adapter does not display a screen pop on email create and email reply create.

Screen pop for Open Media (workitems)

You can configure Adapter to initiate a screen pop when an agent receives an Open Media invite from a contact by selecting the **Screen Pop On Open Media Invite** setting.

- When selected, Adapter displays the screen pop on open media invite.
- When not selected or if the option is not available, Adapter displays the screen pop only when the agent accepts the invitation for an open media interaction.

Screen pops for conference or transfer interactions

When an agent performs a chat (including SMS) conference or transfer, Adapter can update the UserData with the ID of the object the agent is viewing in Salesforce. Updating the UserData ensures that the agent who receives the conference or transfer gets a screen pop for the most relevant object, which is helpful when:

- There are multiple matches for a screen pop search initially and the agent has to select between them.
- There are no matches for the initial screen pop search and the agent creates a new record.

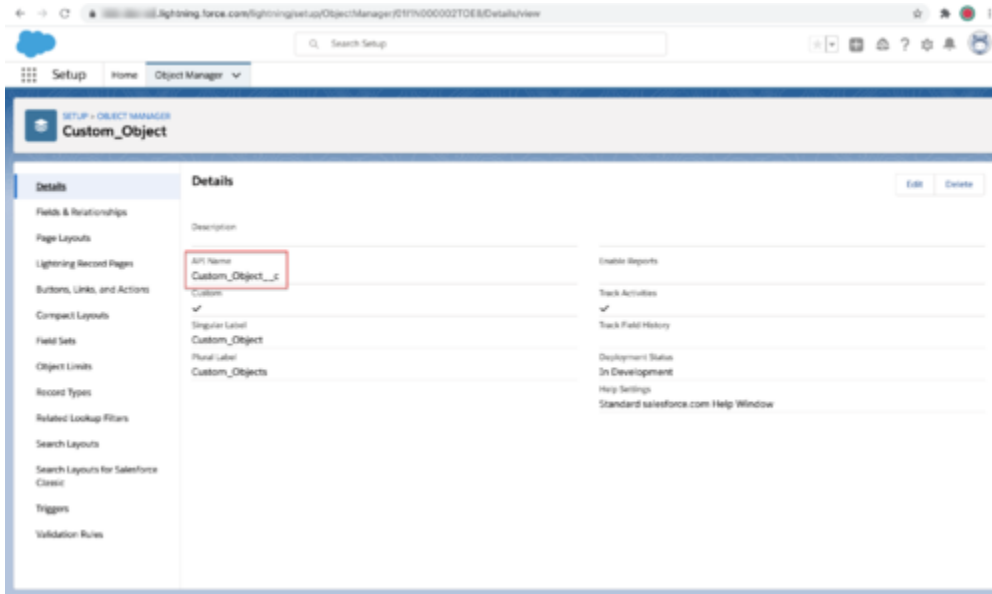
You can enable this feature by setting the value of the **Object ID UserData Key** option to **id_transfer_object**.

When Adapter updates the UserData, any existing UserData keys that begin with "id_" or "cti_" are removed and a new key, called "id_transfer_object", is added with the object ID of the focused page. If the focused page doesn't correspond to a Salesforce object, Adapter does not make an update and the existing UserData is sent with the conference or transfer request.

If you configured your environment to use a key other than "id_" or "cti_" by using the **screenpop.id-key-regex** option, then you must also set the **screenpop.transfer-object-key** to your custom key for screen pop to work. Adapter adds the key specified by this option instead of **id_transfer_object**.

Create a new Salesforce record on screen pop

Gplus Adapter can create new Salesforce records based on a specified Salesforce Object API name (for example **Custom_Object__c**. Refer to the screenshot.) and interaction data field mapping then screen pop the created record.



Use this feature to create a new Salesforce record in the following scenarios:

- When the search for an existing Salesforce record for screen pop returns no matching record.
- To create a new Salesforce record for *every* interaction.

To have Gplus Adapter screen pop a new record, you must create a Salesforce custom object API to be used as a template for a new Salesforce record and you must define the record field mapping where 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.

To enable this feature, select the **Create New Salesforce Record on Screenpop** option in Agent Setup. This option depends on the following options in Agent Setup:

- **Salesforce Object API Name**
- **New Salesforce Record Field Mapping**

This screenshot shows you the relationship between the UserData associated with an interaction, configuration in Agent Setup, and Salesforce record fields for a New Salesforce Record Field Mapping. In this example, "custom-field-mappings" is the name of the new configuration section that is specified in the **Activity Log Field Mapping** option in Agent Setup. "Firstname" and "Firstname__c" represent the key-value pairs that are specified for the "custom-field-mappings" section. In your environment, you specify values that are relevant to your organization.

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

[custom-field-mappings]
Firstname=Firstname__c
Lastname=Lastname__c
```

userData Key Name

Salesforce Custom Field Name

The image shows two parts of the Salesforce interface. The top part is a 'New Salesforce Record Field Mapping' dialog box. It has a search bar and an 'Add' button. Below, there are three rows of mapping: 'Firstname' maps to 'Firstname__c', 'Lastname' maps to 'Lastname__c', and 'Phone' maps to 'Phone__c'. There are 'Revert' and 'Close' buttons at the bottom left, and a 'Save' button at the bottom right. The bottom part of the image shows the 'Setup > Object Manager > Claim' page. It has a 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', and 'Field D'. The 'Fields & Relationships' section is active, showing a table with 7 items. The table has columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', and 'CONTROLLING FIELD'. The rows are: 'Claim Name' (Name, Text(80)), 'Created By' (CreatedById, Lookup(User)), 'Firstname' (Firstname__c, Text(5)), 'Last Modified By' (LastModifiedById, Lookup(User)), and 'Lastname' (Lastname__c, Text(100)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Claim Name	Name	Text(80)	
Created By	CreatedById	Lookup(User)	
Firstname	Firstname__c	Text(5)	
Last Modified By	LastModifiedById	Lookup(User)	
Lastname	Lastname__c	Text(100)	

Link new Salesforce record to an existing record

Gplus Adapter and Salesforce can be set up to link the new Salesforce record that is created when

the value of the **Create New Salesforce Record on Screenpop** option in Agent Setup is set to **Always** to an existing record in Salesforce.

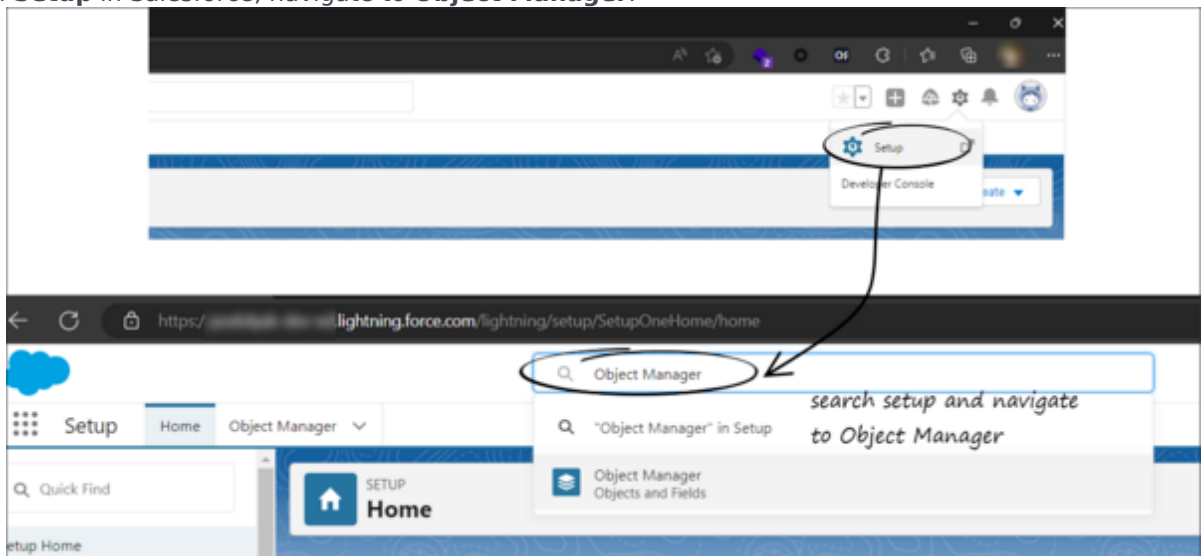
Gplus Adapter uses the screen pop record search to find a *unique* record in the Salesforce database and associates it with the newly created record based on a Salesforce Lookup relationship that you define. If a unique record is not found, the new Salesforce record cannot be linked to an existing record.

When the agent completes the interaction, the linked Salesforce record is screen popped.

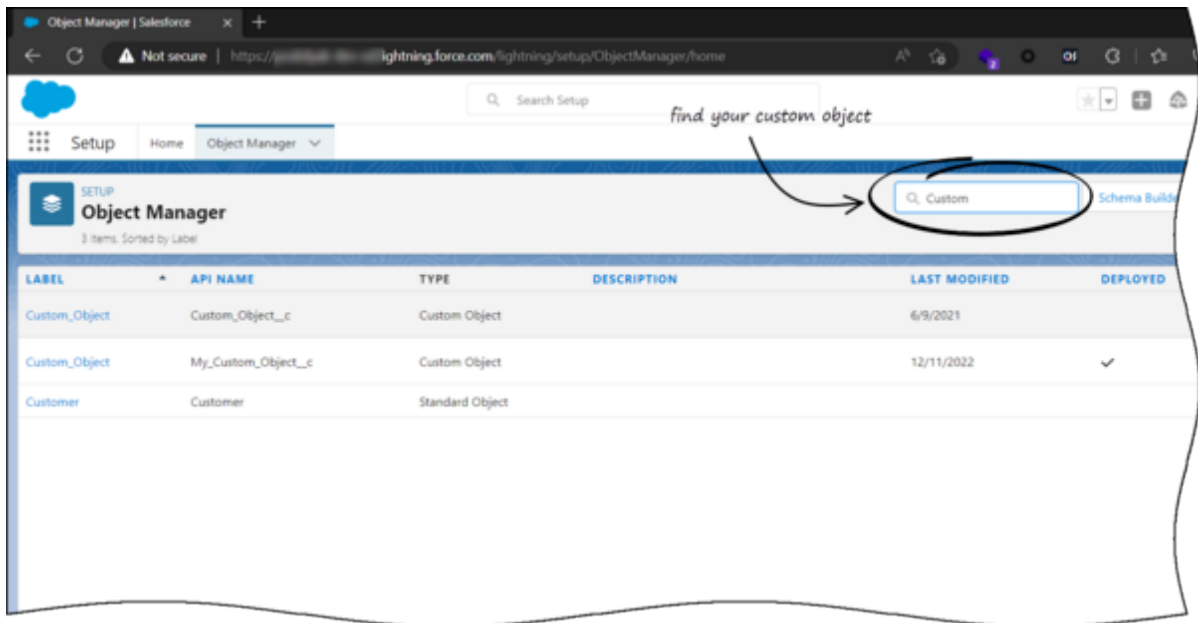
Creating a Lookup relationship

To enable Gplus Adapter to connect the Salesforce Object API object that you created in Create a new Salesforce record on screen pop (for example **Custom_Object__c**) with an existing Salesforce record, create a Lookup relationship for the object.

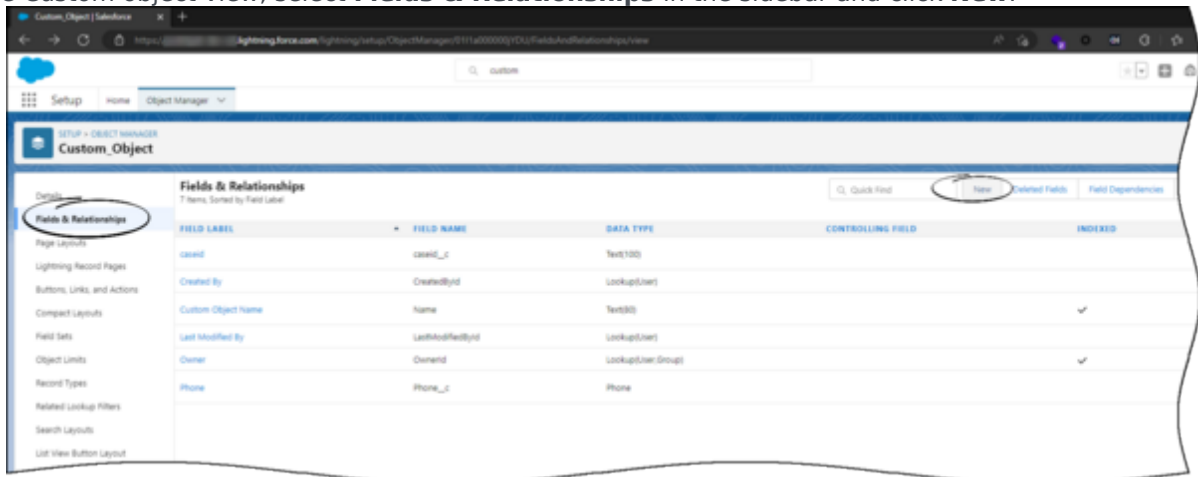
1. From **Setup** in Salesforce, navigate to **Object Manager**.



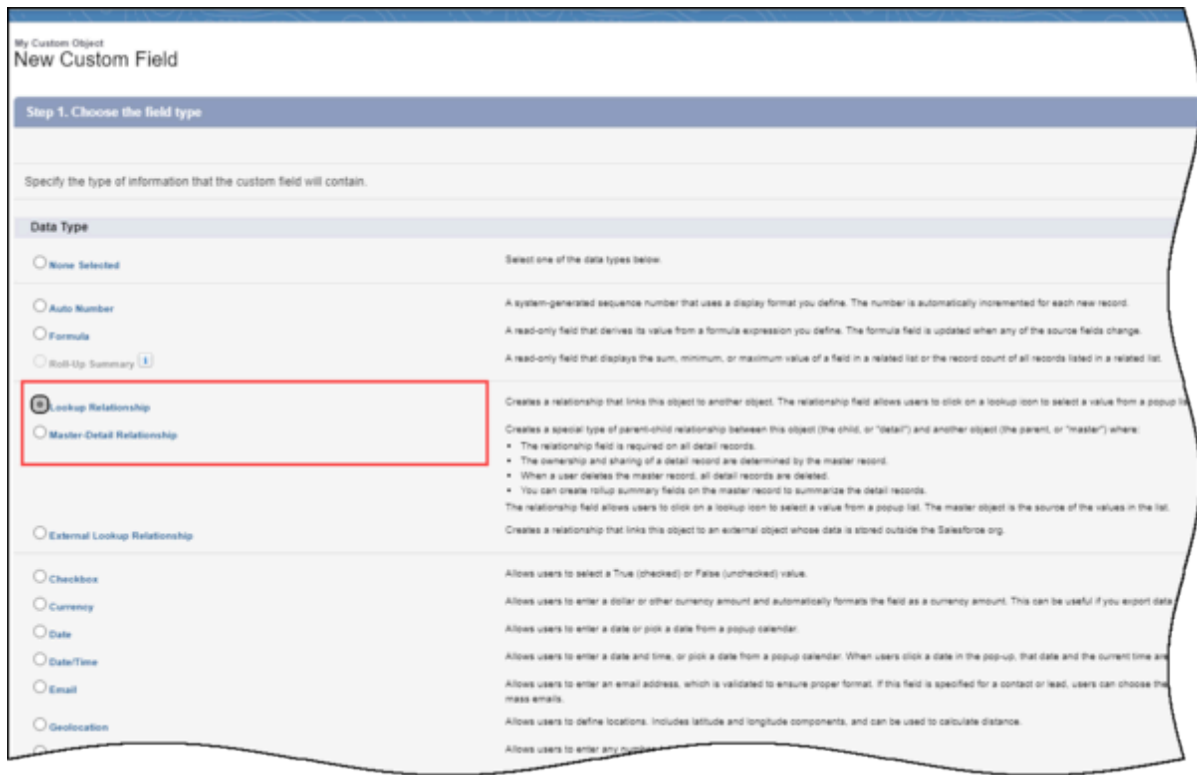
2. Find your custom object and select it.



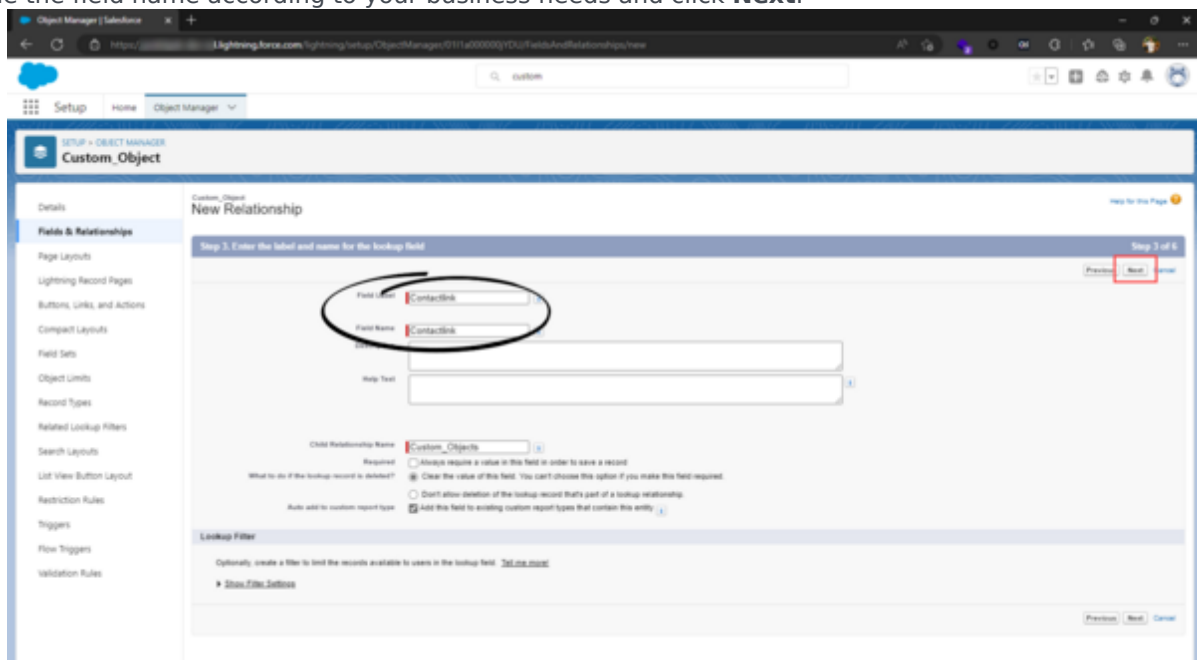
3. In the Custom object view, select **Fields & Relationships** in the sidebar and click **New**.



4. In the **New Custom Field** view, choose either **Lookup Relationship** or **Master-Detail Relationship** and click **Next**.



5. From the **Related To** menu, select the object you want to relate to the new record and click **Next**.
6. Name the field name according to your business needs and click **Next**.



7. To complete the Lookup relationship, click **Next**, **Next**, and **Save**.

Important

To enable this feature, configure the **Associate New Salesforce Record to Existing Record** option, which specifies the name of the Salesforce field Gplus Adapter that can be used for association of a new Salesforce record to an existing Salesforce record.

Attached data

You can configure Adapter to save the ID, name, and type of the focused Salesforce object to attached data when an agent clicks **Mark Done**. Set the values of the **Salesforce Object Key**, **Salesforce Object Name**, and **Salesforce Object Type** options to the keys you want Adapter to use when saving the ID, name, and type. Set these options to ensure the ID, name, or type is added to the attached data when agents create a new object during a call.

For more information about setting up Case Data, see Case and toast data.

Screen pop by Salesforce object type

Important

This feature is not supported for Salesforce Classic.

You can use the **Screen Pop object type** option in Agent Setup to specify what type of object you want Salesforce to screen-pop. This feature supports voice and digital channels interactions. **SUBJECT** is the default value, other available object types are:

- **FLOW**: Pops to the target flow. The flow is specified by the **Screen Pop Flow section name** option. Additional arguments can be passed to the flow, for example, the caller's phone number or a list of matching records. To take the flow name and arguments from the attached data, specify the flow name and "flowArgs", valid flow arguments in JSON format, or the `$attach_data_flow_name$` and `$attach_data_flowArgs_name$` parameters.
- **URL**: Opens the URL in a new browser or tab. The URL is specified by the **Screen Pop URL section name** option. To take the URL from the interaction attached data, specify the URL or use the `$attach_data_key$` parameter.
- **OBJECTHOME**: Pops to the home of an object or entity, such as a Case or an Account. The object home is specified by the **Screen Pop Object Home section name** option. To take the object name from the interaction attached data, specify the object or the `$attach_data_key$` parameter.
- **LIST**: Pops to the specified list of Salesforce objects, such as Contacts or Accounts. The list is specified by the **Screen Pop List section name** option. To take the List from the interaction attached data,

specify the user data keys or the `$attach_data_list_id$` and `$attach_data_list_scope$` parameters.

- **SEARCH:** Pops to the Top Results section of the search page. The search string is specified by the **Screen Pop Search section name** option. To take the string from the interaction attached data, specify the search string or the `$attach_data_search$` parameter.
- **NEW_RECORD_MODAL:** Pops a modal form for creation of a new object, such as Account, Case, Contact, or Lead. The new record modal is specified by the **Screen Pop New Record section name** option. To take the new record type from the interaction attached data, specify the object name or the `$attach_data_entityname$` parameter.

Integrating Genesys Universal Contact Server (UCS)

You can enable agents to use Agent Workspace Team Communicator to call a contact that is stored in the Universal Contact Server (UCS) and view the detailed contact information from the **Contacts** tab. For more information, see [Configure global login](#).

Activity History

Contents

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 - [1.2 Activity Task association by Gplus Adapter in Salesforce](#)
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- Administrator

Activity history entries are created by Gplus Adapter in Salesforce at the end of a call, chat, SMS, email, open media interaction, or an outbound campaign call.

Related documentation:

-

Gplus Adapter can save different types of interactions to a Salesforce activity history entry. Use the following options in Agent Setup to enable or disable the creation of activity logs:

- Use the **Voice Activity Log** option to specify whether or not to create an activity task for the following call types:
 - Inbound
 - Outbound
 - Internal
 - Consult
- Use the **Chat Activity Log** option to specify whether or not to create an activity task for the following chat types (including SMS):
 - Inbound
 - Consult

Adapter integration of SMS is the same as chat with only minor differences as described in this document. For SMS, the Activity task is created only for an unassigned contact in the Agent Workspace **Communication** tab. For SMS, the only UserData that can be transferred by SMS are the **from** and **to** phone numbers and the **text** of the SMS.

- Use the **Open Media Activity** option to specify whether or not to create an activity task for the following media types:
 - Inbound

Task and activity creation by Gplus Adapter in Salesforce

Gplus Adapter creates activity logs in Salesforce for every interaction handled by an agent. When the agent completes an interaction, Gplus Adapter searches for a corresponding contact in Salesforce and creates a task/activity for the interaction and associates it with the Salesforce object.

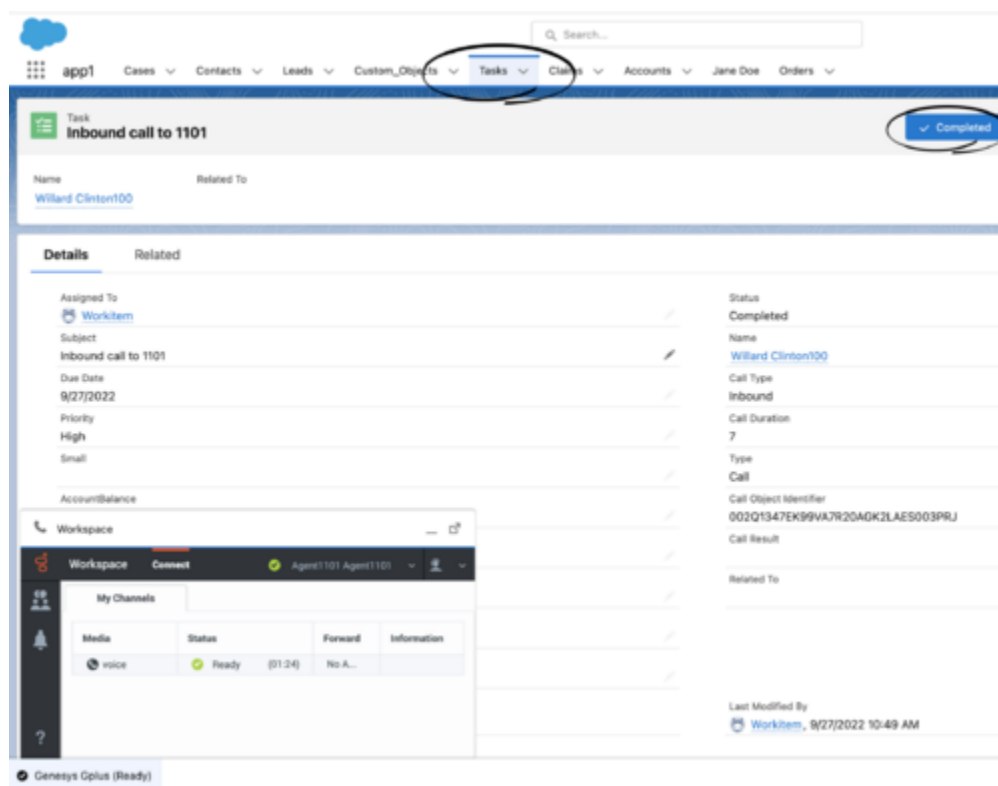
The rule that Gplus Adapter uses to select the correct record for activity log creation is the same as for screen pop record. The ANI phone value is used as the search main criterion. Additionally, if the call data contains a key name that is prefixed with **cti_** or other optionally defined prefix, it includes those key values in the search request using **OR** logic.

You must ensure that all the Activity Log fields in Salesforce exist. If one or more fields do not exist in Salesforce, an error will occur when Gplus Adapter tries to update the activity.

Gplus Adapter can also create Activity Tasks in Salesforce when the screen pop is displayed. Gplus Adapter then modifies logged activity when the interaction is completed. Activity on screen pop is created for voice, chat, email, and open media (workitems) interactions. Any changes in **Comments** field before the interaction is completed are overwritten by Gplus Adapter. Select the **Activity Log on Screen Pop** setting in Agent Setup to enable this feature. This feature is overridden by Salesforce Object Search and Salesforce Open Record. When an agent creates an email, Gplus Adapter creates an activity task. If the agent deletes the email without sending it, the activity task is not updated.

Activity Task display

When an agent completes an interaction, Gplus Adapter displays the Activity Task it created or updated in Salesforce, as shown in the figure.



To configure this feature, in the **Agent Annex** or **Agent Group Annex**, create the **salesforce.activity-log.display-on-creation** key in the **crm-adapter** section and set the value to **true**.

Activity Task association by Gplus Adapter in Salesforce

Gplus Adapter provides different ways that Salesforce Activity Tasks can be associated to Salesforce objects:

- Salesforce Search (default behavior)
- Salesforce Open Record

Task Association based on Salesforce Search

By default, when an activity is created, Gplus Adapter searches for records in Salesforce using Genesys interaction data to associate a created Activity Task to a Salesforce object. During object search, the following task association scenarios are possible:

- **Salesforce search returns a unique object:** Gplus Adapter automatically associates the Activity Task with the Salesforce object.
- **Salesforce search returns no objects:** Gplus Adapter saves the Activity Task in the Salesforce Task list.
- **Salesforce search returns multiple objects:**
 - Gplus Adapter saves the Activity Task in the Salesforce Task list if Gplus Adapter is not able to determine which object to associate the Task with because the objects have matching values.
 - Gplus Adapter associates the Activity Task to one of the multiple search results Salesforce objects if that object is opened by the agent and remains open when the interaction is completed.

For Gplus Adapter to automatically associate as many Activity Tasks as possible with a specific Salesforce object during the handling of the interaction, Genesys recommends that you ensure most, if not all, Salesforce object searches return a unique record.

If the Salesforce object is a Case and you want to associate the Activity Task to the Case, the Case must include a searchable phone number. See the following Salesforce Help documents for information about configuring searchable field in a Salesforce Case:

- Searchable fields in the Case object
- Making additional fields searchable

If an agent initiates an outbound call by using Click-To-Dial to dial a phone number from the Salesforce Case, Contact, or other object, the Adapter obtains the Salesforce Object ID then creates and associates an activity log record with the object from which the call was dialed.

By default **Salesforce Search** is enabled.

Task Association based on Salesforce Open Record

You can configure the Salesforce Activity Task association behavior so that Gplus Adapter associates the Activity Task with the active Salesforce record that is open in Salesforce when the agent completes an interaction.

To enable this feature, set the **Auto Activity Log Association** option in Agent Setup to **Salesforce Open Record**.

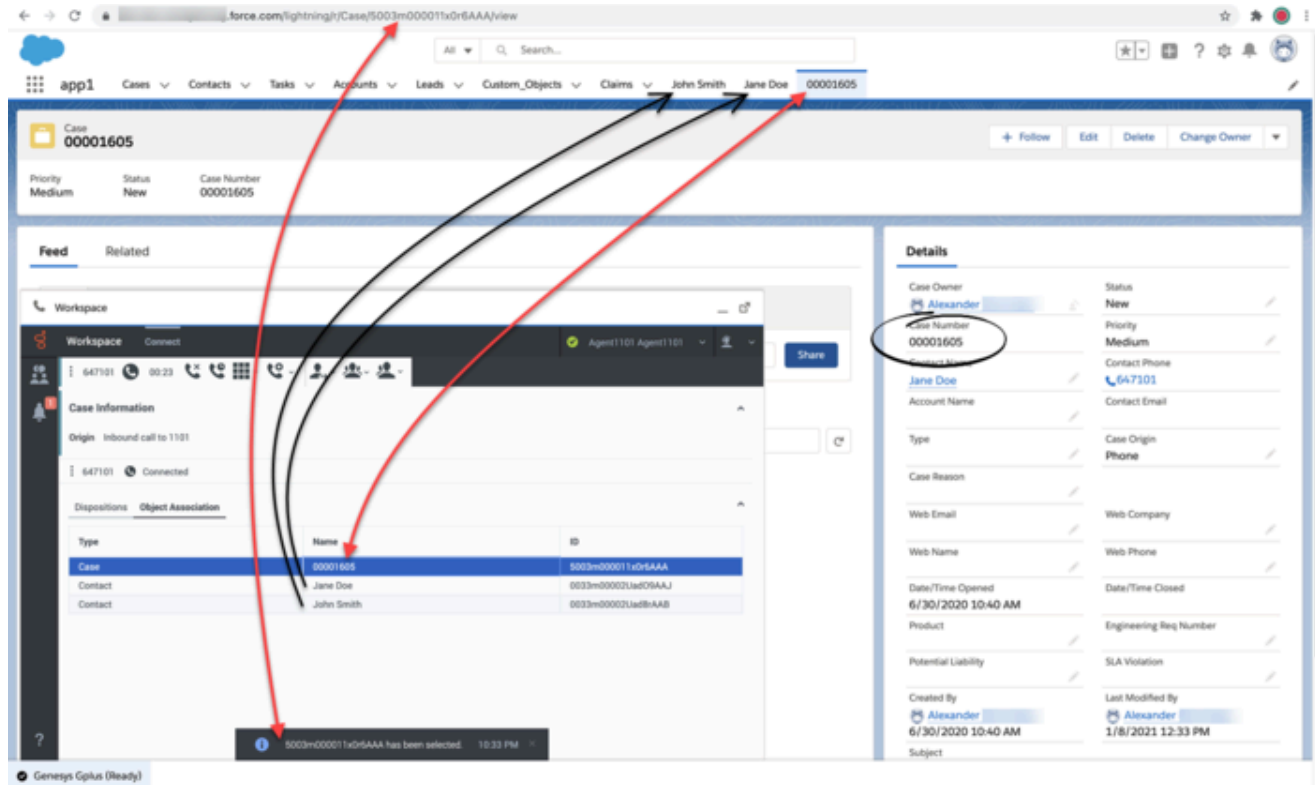
Gplus Adapter Object Association UI

Gplus Adapter can be configured to display the **Object Association** table which lists the Salesforce objects that are opened by an agent during the handling of an interaction. While the interaction is

Activity History

active, each time a Salesforce object is opened Gplus Adapter adds the object as a new row in the **Object Association** table.

To associate an object with the Activity Task, the agent can select a row in the **Object Association** table before the agent completes the interaction. If the agent does not select a Salesforce object from the table, Gplus Adapter associates the Activity Task to the object search result or to the currently open and active record, depending on configuration.



Use the **UI Activity Log Association** option in Agent Setup to specify whether Gplus Adapter displays the **Object Association** table in the Interaction view in Gplus Adapter.

Important

If you navigate to a Salesforce object with a customized API Name, this object will not be added to the Object Association list.

Activity notifications

The screenshot displays the Salesforce Agent Workspace interface. At the top, there is a navigation bar with a search bar and a list of tabs: app1, Cases, Contacts, Accounts, Custom_Objects, Tasks, Leads, Opportunities, and Jane Doe. Below this, a header section shows the contact name 'Jane Doe' and several activity status indicators: Opportunities (0), Cases (0), Open Activities (0), Activity History (1), and Campaign History (0). The main workspace area is titled 'Details' and 'Chatter'. It features a 'Workspace' section with a 'Connect' button and a dropdown menu for 'Agent1101 Agent1101'. A table titled 'My Channels' is visible, with columns for 'Media', 'Status', and 'Forward'. The table contains one row: 'voice' with a status of 'Ready' (indicated by a green checkmark) and a duration of '(27:11)'. A notification banner at the bottom of the workspace reads: 'Gplus Adapter notification' with a green checkmark icon, 'Salesforce task created', and 'Task related to Contact Jane Doe'. The notification is timestamped '3:05 PM' and has a close button. A red arrow points to this notification. At the bottom left, there is a status indicator for 'Genesys Gplus (Ready)'.

Media	Status	Forward
voice	Ready (27:11)	No Active Forward

For troubleshooting purposes, you can configure Gplus Adapter to display confirmation messages in Agent Workspace when the following Salesforce Activity Task events are successful:

- Activity Task is created.
- Activity Task is associated to a Salesforce object on Salesforce Screen pop.
- Activity task is updated.
- Activity Task is associated to a Salesforce object when an interaction is completed.

Select the **Notifications** setting in Agent Setup to enable this feature.

To troubleshoot **saveLog()** method errors, see expanded troubleshooting

notifications.

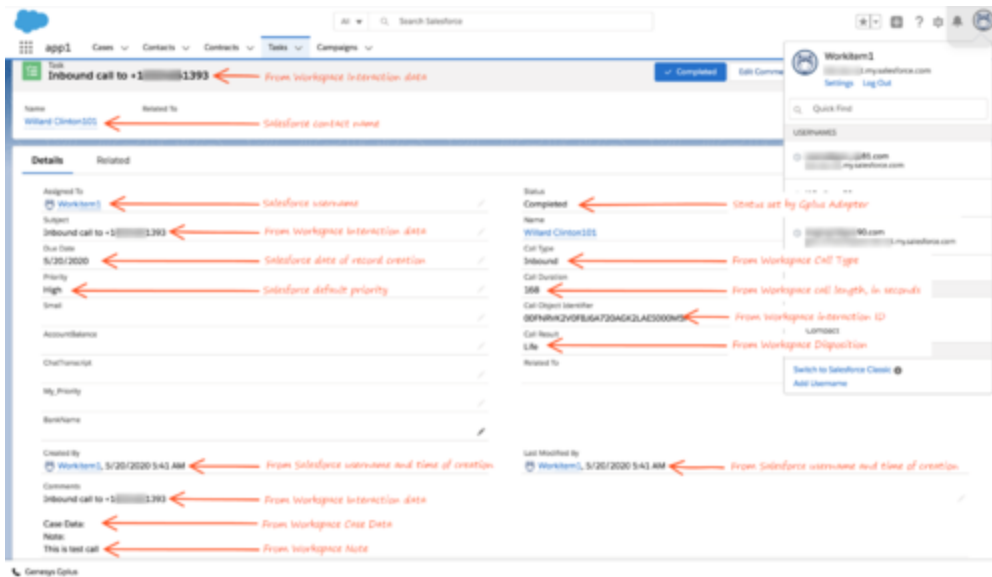
Activity History fields

By default, Adapter updates certain Salesforce activity fields when it saves an activity history entry. The Salesforce activity fields table details the correspondence between the Salesforce Activity fields and Gplus Adapter fields. The annotated screen shot below the table shows where the information comes from to populate the fields in Salesforce.

You can also create custom activity fields to store additional values as part of activity creation. See Customizing Activity Fields for more details.

Salesforce Activity Field label	Salesforce Internal Field name	Genesys Data
Call Duration	CallDurationInSeconds	Interaction duration in seconds, from Workspace Web Edition.
Call Object Identifier	CallObject	Interaction Id from interaction data.
Call Result	CallDisposition	Disposition data added by the agent in Workspace Web Edition.
Call Type	CallType	Type of call, such as inbound, outbound, or internal.
Comments	Description	Text integrating information from the following: <ul style="list-style-type: none"> • Subject field • Case data from Workspace Web Edition • Note added by an agent in Workspace Web Edition • The content of a Chat, SMS, or Email interaction, if appropriate
Due Date	ActivityDate	Activity Date from interaction data.
Name	Whold	Salesforce Object to which this Activity is linked. This field represents an activity task association. This value is not provided automatically by Gplus Adapter.
Priority	Priority	These values are preset in the Salesforce configuration.
Related To	WhatId	Salesforce Case that the activity history is associated with. This field represents an activity task

		association. This value is not provided automatically by Gplus Adapter.
Status	Status	Values are preset in the Salesforce configuration, one of them can be chosen with Salesforce Activity Log Status, default value is Completed
Subject	Subject	Text including the type of interaction, direction, and so on. Format of this field can be customized, refer to Configuring Subject fields.
Type	Type	Type of interaction from the interaction data, such as Call or Chat.



Customizing activity fields

Gplus Adapter also allows you to create your own custom activity fields, and populate those fields with data specific to your organization. For example, you can create custom activity fields that can populate call, chat, SMS, or email related data in your Salesforce reports. You can also create a custom field for storing chat transcripts (including SMS).

The first step is to create a custom activity field in Salesforce as described in the Salesforce documentation.

Once you create a custom activity field in Salesforce, ensure that you define a mapping between the custom activity field and Genesys UserData keys so that the new custom field is populated with relevant data when Adapter saves an activity history.

UserData is structured as a list of data items described as key-value pairs, where the key stands for a parameter name and the value represents the current value of that parameter. Each key-value pair may contain information about only one parameter, whose value data type can be an integer, character string, binary, or unicode. User data is delivered to Gplus Adapter with the interaction and it can be accessed during mapping.

You must ensure that all the fields in the UserData you want to map exist in Salesforce and that the UserData types match the data types of the corresponding fields in Salesforce. If one or more fields do not exist in Salesforce or data types are mismatched, an error will occur when Adapter tries to update the activity.

Mapping custom activity fields

Once you create a custom activity field, ensure that you define a mapping between the custom activity field and Genesys UserData keys so that the new custom field is populated with relevant data when Adapter saves an activity history.

Define the mapping in the **Activity Log Field Mapping** option in Agent Setup.

Here's an example of how to configure the mapping. In this example, "Firstname" and "Lastname" represent key names from the interaction UserData (replace these with key names from interaction UserData in your environment), and "Firstname__c" and "Lastname__c" represent the custom field names in Salesforce to which you want to map the UserData value (replace these with custom field names in your environment).

This screenshot shows you the relationship between the interaction userData key name and the Salesforce Field Name. Use this data to configure field mapping in the **Activity Log Field Mapping** option in Agent Setup.

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

[custom-field-mappings]
Firstname=Firstname__c
Lastname=Lastname__c
```

userData Key Name

Salesforce Custom Field Name

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Firstname	Firstname__c	Text(100)	
Lastname	Lastname__c	Text(100)	
Phone	Phone__c	Number(16, 2)	

Important

If you change the value of **Activity Log Field Mapping**, make sure to validate the change by confirming that Salesforce tasks are created correctly.

Custom Status

Prerequisite: Create custom values for the Status selection drop-down list in Salesforce. Refer to Add Custom Task Types and Customize Tasks in the Salesforce Help.

Next, you can define an activity log custom status to be applied by Gplus Adapter when an interaction is ending, such as **Completed**, **Answered**, and others that fit your business needs by specifying custom statuses as values of the **Salesforce Activity Log Status** option.

Configuring Subject field

You can configure what Adapter saves for the **Subject** field in the Salesforce activity by using custom templates with the **Gplus Adapter for Salesforce options** option, where, is either **Inbound-Voice**, **Internal-Voice**, **Outbound-Voice**, **Transfer-Voice**, **Chat** (including SMS), **Email**, or **OpenMedia**.

The value is a string that contains any text, along with template variables wrapped in the reserved "{" and "}" characters.

You can use as many instances of this option as you need to handle multiple interaction types. For example, your configuration could include options for each of the supported interaction types:

- Templates Salesforce Inbound-Voice Subject
- **Templates Salesforce Internal-Voice Subject**
- Templates Salesforce Outbound-Voice Subject
- Templates Salesforce Transfer-Voice Subject
- Templates Salesforce Chat Subject
- Templates Salesforce Email Subject
- **Templates Salesforce OpenMedia Subject**

Gplus Adapter supports **only** the following templating variables:

Variable	Description
interaction.ani	The number that originated the call. This variable identifies the caller for inbound calls and is best used in inbound templates.
interaction.callType	The type of call (inbound/outbound).
interaction.caseId	The unique ID of the related case.
interaction.contact	The first and last name of contact.
interaction.dnis	The last call dialed (useful for call transfer). This variable identifies the outbound location for outbound calls and is best used in outbound templates.
interaction.endDate	The date and time when interaction ended.

Variable	Description
interaction.isConsultation	This is true if the interaction is a consultation.
interaction.startDate	The date and time when the interaction started.
userData.	<p>This can be any UserData key available for the interaction. You might also find some of the following UserData keys useful (they're included by default by Workspace Web Edition on transfers):</p> <ul style="list-style-type: none"> • userData.GCS_TransferringAgentName — The name of the transferring agent. • userData.GCS_TransferringDate — The date and time of transfer. • userData.GCS_TransferringEmployeeId — The ID of the transferring employee. • userData.GCS_TransferringReason — The reason for the transfer. This is an empty string if no reason exists.
contact.EmailAddresses	A list of email addresses associated with the contact.
contact.PhoneNumbers	A list of phone numbers associated with the contact.

For example, you might want the activity for all inbound voice calls to have details about the customer's name and phone number. In this case, here's how you would configure the option:

Gplus Adapter for Salesforce options = Customer: {interaction.contact}, Phone Number: {interaction.ani}

If a call comes in from Willard Clinton at 123-456-7890, when the call ends Adapter creates the related activity in Salesforce with following subject field: Customer: Willard Clinton, Phone Number: 123-456-7890

Another common use case might be to include information from UserData for all inbound calls. This could come from your own UserData keys or from UserData provided by Workspace Web Edition (see the table above). For example, you want the activity history's subject to include information from your own UserData key, PurposeOfCall, and the contact's name. Here's how you should configure the option:

Gplus Adapter for Salesforce options = Call from {interaction.contact} about {userData.PurposeOfCall}

In this scenario, if Willard Clinton calls into the contact center and chooses the Technical Support option in the IVR, that information is saved in the PurposeOfCall UserData key. When the call ends, Adapter creates the related activity in Salesforce with the following subject field: Call from Willard Clinton about Technical Support

Saving Chat Transcripts

Gplus Adapter can save chat transcript text either as part of the activity description in Salesforce or it can save the text to a custom field name in Salesforce. See Customizing activity fields for more information on how to create a custom chat transcript field.

By default, Adapter saves the transcript as part of the description, but you can turn off this functionality with the **Chat Include Transcript in Description** option. You might want to do this if the transcript and case data are too large for the description field, which has a maximum size of 32K. In this case, you can set the **Chat Transcript Custom Field Name** option to the name of a custom field you defined in Salesforce — Adapter will save chat transcripts to this field instead.

Important

If you change the value of **Chat Transcript Custom Field Name**, make sure to validate the change by confirming that Salesforce tasks are created correctly.

Storing email content in Activity History

The body of an email can be stored as a text version in the **Email Content** field in the **Comments** block of an Activity History in Salesforce. You can turn on or off this feature by using the **Email Include in Activity Description** option.

Open Media Activity History

Open Media items are documents (for example, faxes or PDFs) that might be directed to agents for handling while they are working on interactions of another type, such as email. For the Open Media interactions, the activity type is updated as **inbound** in the **Subject** and the **Call Type** fields of an Activity History. Other fields are updated as explained in the Salesforce activity fields table.

Use the **Open Media Activity Log** option in Agent Setup to specify whether activity histories are created in Salesforce for **Inbound** open media workitems.

Interaction History in Genesys Universal Contact Server (UCS)

Agents can view and manage their previous interactions with a Genesys UCS contact from the Agent Workspace My History tab.

Gplus Adapter support for Service Client API

Contents

- [1 Support for Service Client API in Salesforce Lightning](#)
- [2 Support for Salesforce Lightning Component with Service Client API](#)
- [3 Support for Service Client API in Salesforce Classic](#)

- Administrator

Gplus Adapter supports the Genesys Service Client API, which you can use for custom features.

Related documentation:

-

Support for Service Client API in Salesforce Lightning

Gplus Adapter supports the Service Client API, which you can use for custom features such as invoking click-to-email, starting or stopping a recording when a sensitive field is on the screen, and attaching data from Salesforce to Genesys key/value pairs. Complete the following steps in Salesforce Lightning:

1. Deploy your Salesforce domain.
2. Create and deploy a message channel using Salesforce CLI or a third-party tool such as Workbench. For example, here's a breakdown of the steps you must complete using Workbench:
 - a. Create a folder called **messagedeploy** and add a new file called **package.xml** with the following contents:

```
*
  LightningMessageChannel

47.0
```

- b. In your **messagedeploy** folder, create a new folder called **messageChannels** and add a new file called **GplusChannel.messageChannel** with the following contents:

```
GplusChannel
true
This Lightning Message Channel sends information from VF to LWC and back.
```

- c. Zip (compress) the **messagedeploy** folder.
 - d. Navigate to <https://workbench.developerforce.com/login.php> and log in to Salesforce with the account you will use for the Service Client API.
 - e. Open the **migration** menu, click **Deploy** and attach the zip you previously created.
 - f. Open the **info** menu, click **Metadata Types & Components** and choose **LightningMessageChannel** - you created this in step 2-a.
3. Download **gplus-service-client-api.js** from here and add it to your static resources in Salesforce.
 4. Download the SCAPI example from here.
 5. Create a Visualforce page in Salesforce that uses your new message channel (from step 2-b) and the

Service Client API to implement your custom functionality.

6. Add the Visualforce page to your dashboard.
7. In Agent Setup, configure Gplus Adapter to use your message channel with the **Salesforce Message Channel Name for Service Client API** option.

The value of the **Salesforce Message Channel Name for Service Client API** option must be specified using one of the following formats:

- `NamespacePrefix_ChannelName__c`
- `ChannelName__c`

You must use this format to conform to the Salesforce Naming Conventions for Custom Fields.

Troubleshooting: If you encounter an error after completing this configuration, Genesys might have to adjust your environment settings so that the value of **CORS** is set to * the **Allow full service client API** setting is enabled. Contact Genesys to confirm these settings.

8. To attach key-value pairs to interaction UserData using SCAPI, use the **interaction.setUserData** Method.
9. To validate your Gplus Adapter configuration with SCAPI, login to Adapter, navigate to the SCAPI page and click one of the Methods, such as **agent.get**. If you see the result message **SUCCEEDED**, then configuration is correct.
10. If some SCAPI Methods do not return **SUCCEEDED**, verify that the Workspace options related to the SCAPI Method functionality are configured correctly.

Support for Salesforce Lightning Component with Service Client API

Gplus Adapter supports the Salesforce Lightning Component with Service Client API to enable custom integrations between Salesforce and Genesys. To enable this support, complete the following steps:

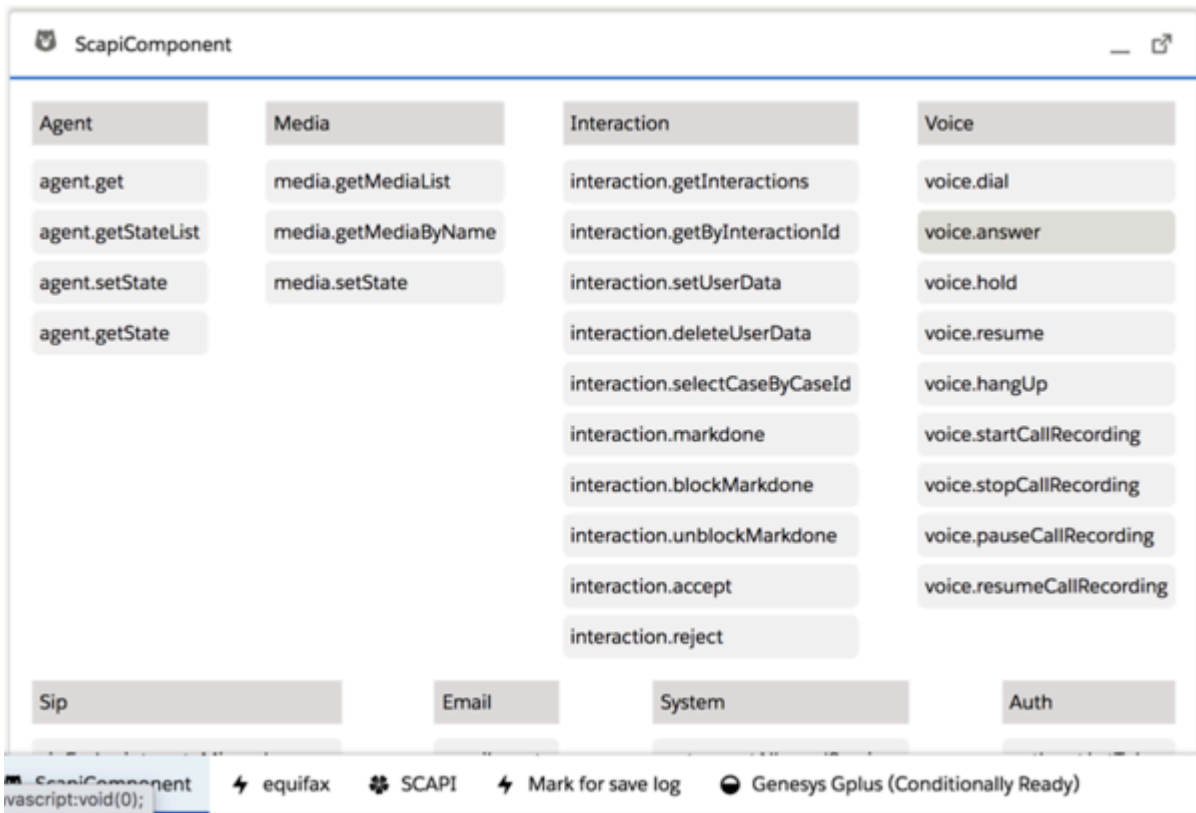
Prerequisites:

- Deploy your Salesforce domain.
- Create and deploy the message channel.

References:

- About the message channel in Lightning Aura Components.
 - How to create a Message Channel.
 - How to publish a Message Channel.
 - How to subscribe to a Message Channel.
 - Lightning Message Service limitations.
1. Download **gplus-service-client-api-universal.js** from here and add it to your static resources in Salesforce.
 2. In Lightning mode open **Setup > Developer Console**.

3. Create a new Lightning component: **File > New > Lightning Component**.
4. Name the new Lightning component **ScapiComponent**.
5. Download **component.html** from here and add the code to your component.
6. Download **controller.js** from here and add the code to the **Controller**.
7. Download **style.css** from here and add the code to the **Style**.
8. Add your component to console. Open **Setup > App Manager > > Edit > App Builder > Utility Items > Add utility Items** and select **ScapiComponent**.
9. Your result should look something like this:



10. In Agent Setup, configure Gplus Adapter to use your message channel with the **Salesforce Message Channel Name for Service Client API** option.

The value of the **Salesforce Message Channel Name for Service Client API** option must be specified using one of the following formats:

- NameSpacePrefix_ChannelName__c
- ChannelName__c

You must use this format to confirm to the Salesforce Naming Conventions for Custom Fields.

Troubleshooting: If you encounter an error after completing this configuration, Genesys might have to adjust your environment settings so that the value of **CORS** is set to * the **Allow full service client API** setting is enabled. Contact Genesys to confirm these settings.

11. To attach key-value pairs to interaction UserData using SCAPI, use the **interaction.setUserData** Method.
-

12. To validate your Gplus Adapter configuration with SCAPI, login to Adapter, navigate to the SCAPI page and click one of the Methods, such as **agent.get**. If you see the result message **SUCCEDED**, then configuration is correct.
13. If some SCAPI Methods do not return **SUCCEDED**, verify that the Workspace options related to the SCAPI Method functionality are configured correctly.

Support for Service Client API in Salesforce Classic

Gplus Adapter supports the Service Client API, which you can use for custom features such as invoking click-to-email, starting or stopping a recording when a sensitive field is on the screen, and attaching data from Salesforce to Genesys key/value pairs. Complete the following steps in Salesforce Classic:

1. Download the SCAPI script from [here](#).
2. Download the SCAPI example from [here](#).
3. Add **gplus-service-client-api-classic.js** to your static resources in Salesforce.
4. Create a Visualforce page with SCAPI (according to the SCAPI example) or a custom console component.
5. Add the Visualforce page to your dashboard.

Troubleshooting Gplus Adapter Integration with Salesforce

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- Administrator

If you are having issues with Gplus Adapter integration with Salesforce, you can try some of these solutions.

Related documentation:

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Expanded troubleshooting notifications

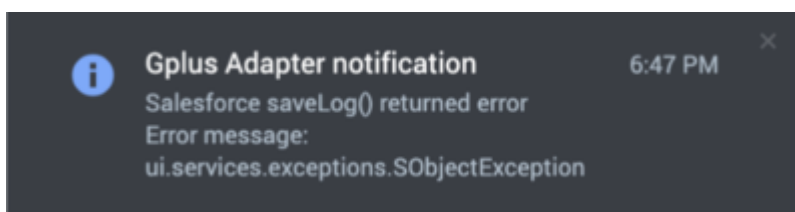
To configure troubleshooting and confirmation notifications, in the **Agent Annex** or **Agent Group Annex**, create the **salesforce.debug-notifications** key in the **crm-adapter** section and set the value to **true**.

Salesforce Client API saveLog() method error Notifications

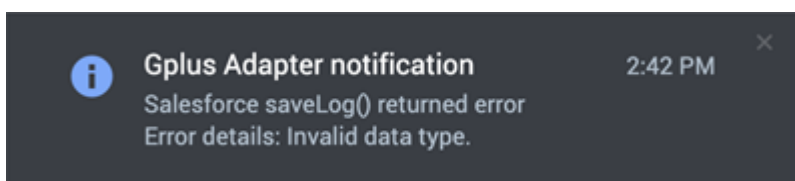
To troubleshoot Salesforce Client API **saveLog()** method errors, Gplus Adapter can display notifications. To fix **saveLog()** method errors, validate your Salesforce configuration, and ensure that the interaction data matches your Salesforce configuration.

The following are examples of Salesforce error notifications when the Salesforce **saveLog()** method is called:

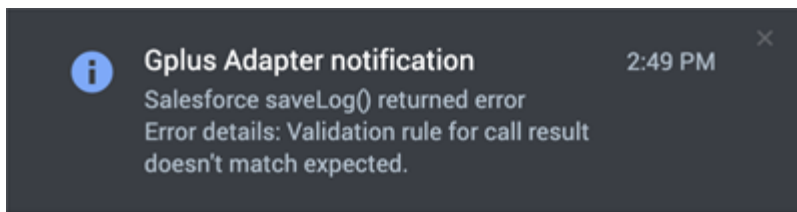
- Mismatch between the name of the field in custom field mapping and Salesforce field label for Activity object.



- When interaction userData type does not match Salesforce object custom field data type.



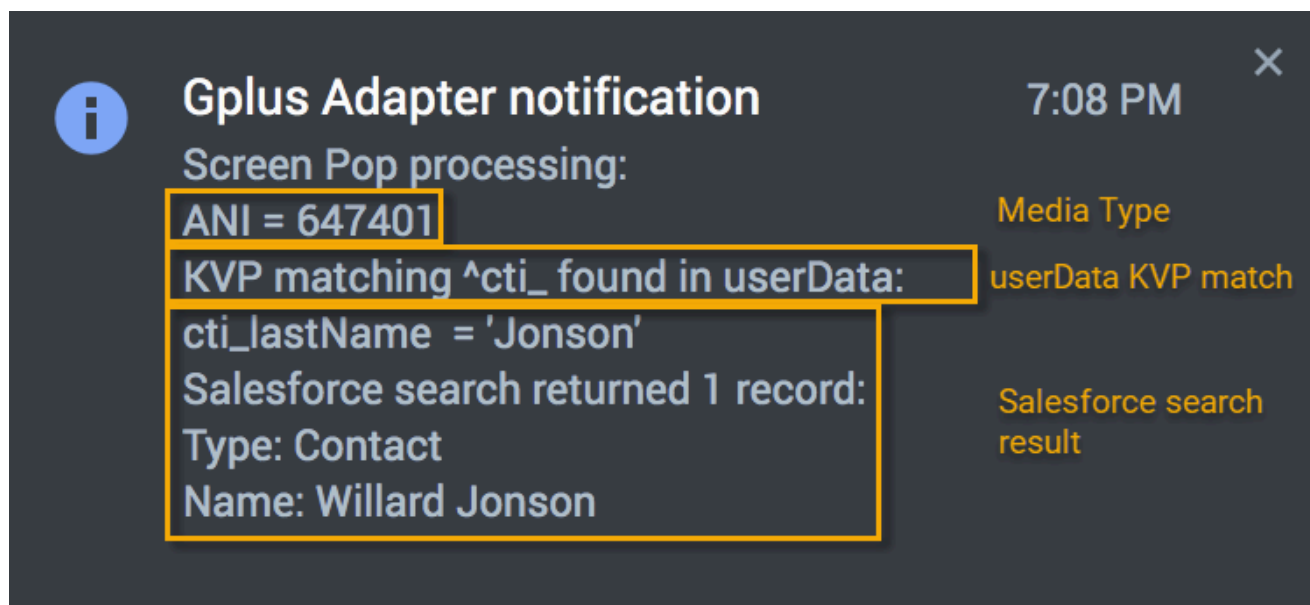
- When Salesforce Object validation rule formula results in an error.



Expanded screen pop events notifications

For troubleshooting purposes, you can configure Gplus Adapter to display the same notifications in Agent Workspace when Screen Pop events are successful or unsuccessful. To enable this feature, in the **Agent Annex** or **Agent Group Annex**, create the **salesforce.debug-notifications** key in the **crm-adapter** section and set the value to **true**. Refer to Gplus Adapter screen pops for information about the screen pop search process and options.

This screenshot provides an example of a confirmation notification:



The notifications follow this basic form:

Media type

If the interaction media type is available, Gplus Adapter displays the ANI, DNIS, email address, and so on, in this line. For voice interactions, the phone number that is displayed is dependent on the options configured in Agent Setup.

userData KVP match

The user Data KVP match lines provides information about whether Gplus Adapter found key names

in the interaction **userData** that matched **id_**, **cti_**, or a KVP specified by the **RegEx to Match UserData** option in Agent Setup.

Salesforce search result

Gplus Adapter displays the number of matching records found and record type and name information based on the Salesforce record search.

Finding your notifications in Agent Workspace

In Agent Workspace, notifications display for a short time. To access all the notifications, open the Agent Workspace **Notifications** view from the Side Bar.

Gplus information in browser log

crm-adapter option browser log messages

For troubleshooting purposes, Gplus Adapter writes the list of all agent level **crm-adapter** option settings to the browser log.

To find the list of configured Gplus Adapter options, search the log for the following string: **Gplus Adapter options**

Screen Pop browser log messages

Gplus Adapter also automatically writes messages to the browser log when Screen Pop events are successful or unsuccessful, showing all the search results that Gplus found in the interaction media type, the interaction userData, and the Salesforce records database. The messages helps you to identify the root cause when a Screen Pop is unsuccessful.

To find the Screen Pop browser log message, search the log for the following string: **Screen Pop processing**

The following is an example of a browser log message for a successful Screen Pop:

```
2022-08-16 14:04:41.230 [DEBUG] [WWE.Main.Application] Screen Pop processing:
ANI = 647401
KVP matching cti_ found in interaction userData:
cti_LastName = Clinton
```

```
Salesforce search returned 1 record:
Type: Contact
Name: Willard Clinton
```