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Gplus Adapter for Salesforce Administrator's Guide

Integrating Gplus Adapter in Classic

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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**.

Install Genesys Gplus for Salesforce
By Genesys

Install for Admins Only
 Install for All Users
 Install for Specific Profiles...

[Install](#) [Cancel](#)

Select this installation

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

[Additional Details](#) [View Components](#)

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

Install Genesys Gplus Adapter for Salesforce
By Genesys

i Installation Complete!

[Done](#)

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

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

You should be redirected to the **Installed Packages** page, with "Genesys Gplus for Salesforce" included in the list.

Installed Packages

Help for this Page 


On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#).

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.



Installed Packages										
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	
Uninstall 	Genesys Gplus for Salesforce	Genesys	1.3	g_gplus	06/08/2015 1:17 PM	<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.

SETUP
Call Centers

Call Center
GPlusClassic [Help for this Page ?](#)

[All Call Centers](#) » GPlusClassic

Call Center Detail [Edit](#) [Delete](#) [Clone](#)

General Information

InternalName	GPlusClassic
Display Name	GPlusClassic
CTI Adapter URL	https://GWSHOST.GWSPORT/ui/crm-adapter/index.html?crm=salesforce
CTI Adapter Backup URL	
Use CTI API	30000
Use CTI API	true
Softphone Height	400
Softphone Width	200
Description	Implement classic mode

Call Center Users [Manage Call Center Users](#) [Call Center Users Help ?](#)

Call Center Users by Profile

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

Call Center [Help for this Page ?](#)

Genesys Gplus for Salesforce: Manage Users

[All Call Centers](#) » [Genesys Gplus for Salesforce](#) » [Manage Users](#)

View: [Create New View](#)

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

		Add More Users	Remove Users		
Full Name ↑	Alias	Username	Role	Profile	
No records to display.					

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

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.

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

<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.

