Gplus Adapter for Salesforce Agent's Guide

9/3/2025

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Gplus Adapter for Salesforce (v9)

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Gplus Adapter for Salesforce is a soft phone integrated within the Salesforce environment that offers many of the same features as the Genesys Agent Workspace (v9).

Related documentation:
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> ### Important
> What you see in Gplus Adapter depends on your contact center and your role within it, so you might not be able to do or see all the things covered in this help. If you think you should be able to do or see something you can't, check with your supervisor or system administrator.

Salesforce Lightning and Salesforce Classic

Gplus Adapter supports both Salesforce Lightning and Salesforce Classic. There are some minor differences between how Adapter works under Lightning versus under Classic. These differences are noted in this document where the user experience is significantly modified. For example, Screen Pop by Object type is supported only for Salesforce Lightning. Most of the screen shots depict Adapter in Salesforce Lightning except where differences are significant enough to warrant showing both.

How can I use Gplus Adapter as an agent?

As an agent, you can use Gplus Adapter to handle calls, chats, SMS, emails, or other media channels interactions without navigating away from your Salesforce environment.

Check out the topics below to explore more details.

- Getting Started - helps you to get quickly up and running with your Gplus Adapter.
- Working with Gplus Adapter - helps you to understand the features and functions that are available in Salesforce as part of Gplus Adapter integration.
- Click-to-dial - helps you to make connections easily by clicking to make a call.
- Screen Pops - helps you to see a contact record as soon as you receive an interaction.
- Activity History - helps you to work with the Salesforce contact activity history by adding details about the interactions you handle.
- Genesys Agent Workspace help - helps you to explore complete set of functions that you can use in

Gplus Adapter as an agent.

Getting started

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Logging in and getting ready to take call and handle Genesys Digital channels.
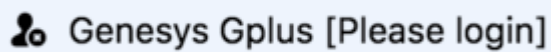
Related documentation:
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How do I log in?

You can log into Gplus Adapter from within Salesforce doing the following:

1. Click the **Genesys Gplus [Please login]** icon in the Salesforce Utility Bar.

   ![Genesys Gplus [Please login]]

2. Follow the log in procedure. For more information about logging in, see Getting started in the Genesys Agent Workspace help.
3. After you successfully log in, you can start working in the Adapter main view.

If your company uses Single Sign-on (SSO), refer to Single Sign-on environments in the Genesys Agent Workspace help.

> ## Warning
> Logging in to Salesforce does not automatically log you in to Gplus Adapter. If the Adapter icon does not show your current Genesys Agent Workspace status, you are not logged in to Genesys and you cannot make or receive calls and other interactions.

Gplus Adapter main view
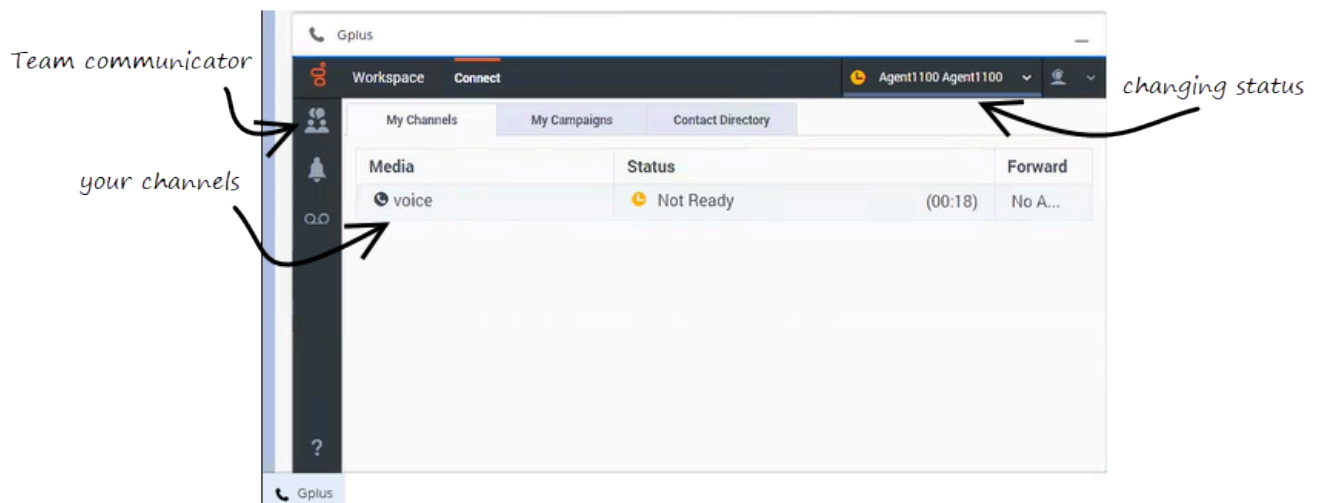
The Gplus Adapter button in the Salesforce Utility Bar displays your current status obtained from Agent Workspace. If Gplus Adapter is minimized, it still reflects changes to your current status. Refer to Getting started in the *Agent Workspace Help* for more information about your status and the status icons.

How do I log out?
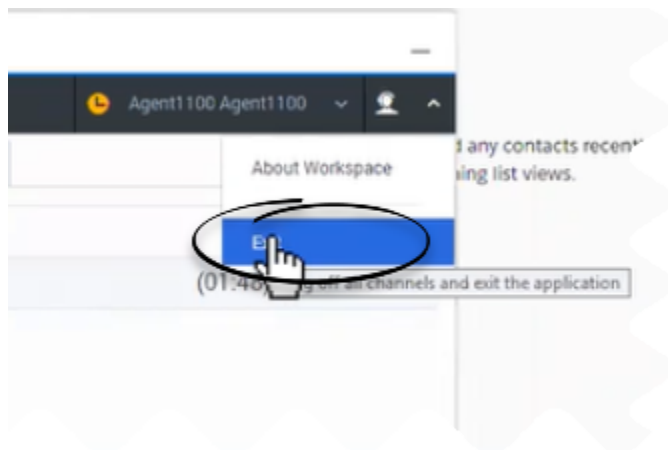
Important

Genesys recommends that you log out of Gplus Adapter before you log out of Salesforce or close the last Salesforce tab.

To log off all channels and sign out of Gplus Adapter, click the agent icon and then select **Exit**. A

modal pop-up window will open asking your confirmation to log out of the application. Click **Exit**. If your company does not use SSO, Adapter returns you to the login page, where you can enter your credentials again, if needed.

Ensure that you close all the interactions before logging out, otherwise you will see an error message.

If your company uses SSO, after you log out, you must click the **Login** link to start a new session. See the Agent Workspace help for details. **NOTE:** This feature is supported only for Cloud deployments.

Working with Gplus Adapter for Salesforce

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Gplus Adapter for Salesforce enables you to handle Genesys contact center functions from Salesforce. It integrates Salesforce features such as activity history update, screen pop, and click-to-dial.

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How do I access Gplus Adapter?

When Gplus Adapter is integrated in Salesforce, a phone icon is displayed in the lower left or lower right corner of the Salesforce window. To open a pop-up login dialog box, click the **Genesys Gplus [Please login]** icon, then log in with your Adapter credentials.

Integrating Interactions with Salesforce Lightning

Gplus Adapter integrates functionality of the following interaction types with Salesforce:

- Voice
- Chat
- SMS
- Email
- Outbound Preview
- Open Media Work items

For more information about handling specific interaction types, refer to the Agent Workspace Help.

Pop out, move and resize Adapter

By default, the Adapter window opens in the lower left corner in the Salesforce environment.

To move the Adapter window to a different location, undock (pop out) the window by clicking ⤴ in the upper right corner, then drag the Adapter window to a new location. Once you undock the window, you can move or resize the window as needed.

You can dock (restore) the window back to its original position by clicking ⤸.
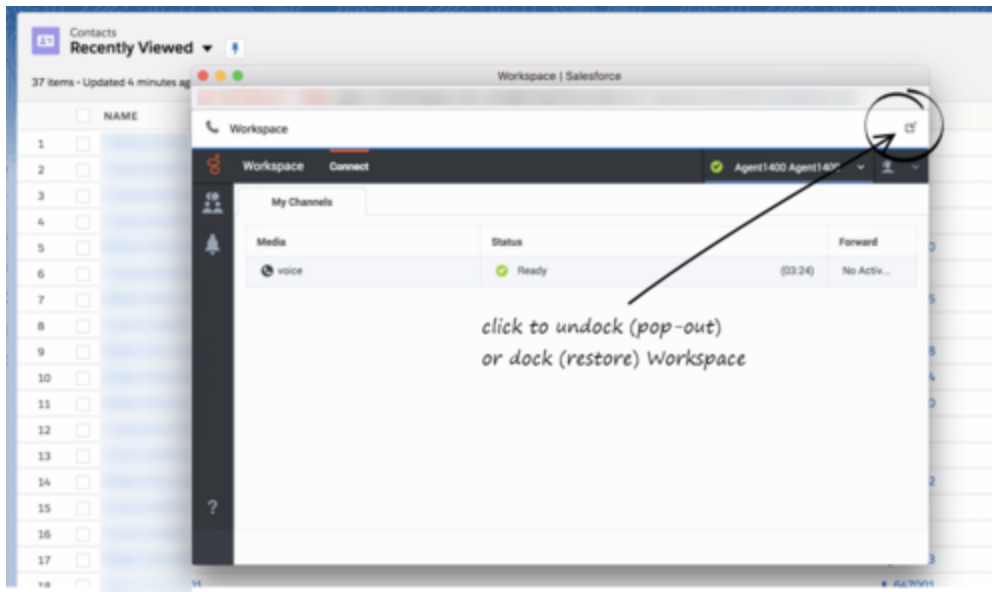
Manually maximize or minimize the Adapter window by clicking ⬜ .

Interaction events triggering Adapter to be maximized

If you have minimized Adapter to handle other tasks in Salesforce, the following events automatically maximize the Adapter window:

- Receiving voice, chat, SMS, email, or workitem interactions
- Releasing interactions
- Marking Done interactions
- Receiving connections error notifications
- Receiving confirmation that an interaction has been processed

Supported features

Gplus Adapter includes features that integrate with a Salesforce environment. Actions you take in Salesforce or Gplus Adapter are passed seamlessly between them.

The integrated features are:

- Click-to-dial
- Screen pops
- Activity history

Using Gplus Adapter in multiple browser tabs

By default, you can work with Gplus Adapter in multiple Salesforce browser tabs. Gplus Adapter is available in each new Salesforce browser tab you open.

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**: 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 Voice call Salesforce record screen pop types).
- **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.

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 about using Agent Workspace in multiple browser tabs.

Gplus Adapter might be restricted to only one browser tab

In some organizations, Gplus Adapter may be used only in the first Salesforce tab you use to login to Gplus Adapter; it is prevented by your organization's administrator from loading in a second browser tab. If Gplus Adapter is set up to prevent loading in a second browser tab, you will see the following message when you open a subsequent tab running Salesforce with Gplus Adapter: **Gplus Adapter is configured to be loaded in only one browser tab**.
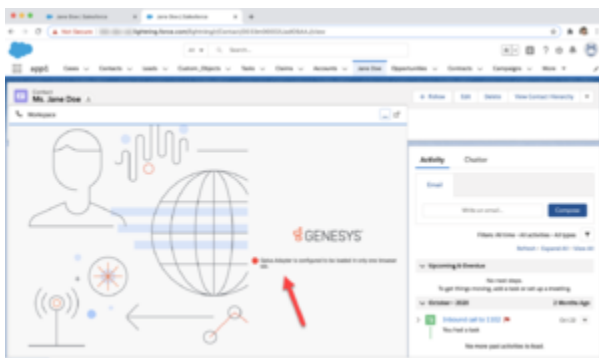
Click to view the message.

Smart Failover

If Gplus Adapter is set up to support Smart Failover for disaster recovery in the event of a system

connectivity loss, you are alerted when a connection loss occurs. You might be required to re-authenticate when Gplus Adapter switches over to a backup connection. For information about the messages that are displayed during a system connectivity loss, see the Handling a System Disconnection section in the Agent Workspace Help.

Related documentation

- To learn how to use Gplus Adapter, see the Genesys Agent Workspace help.
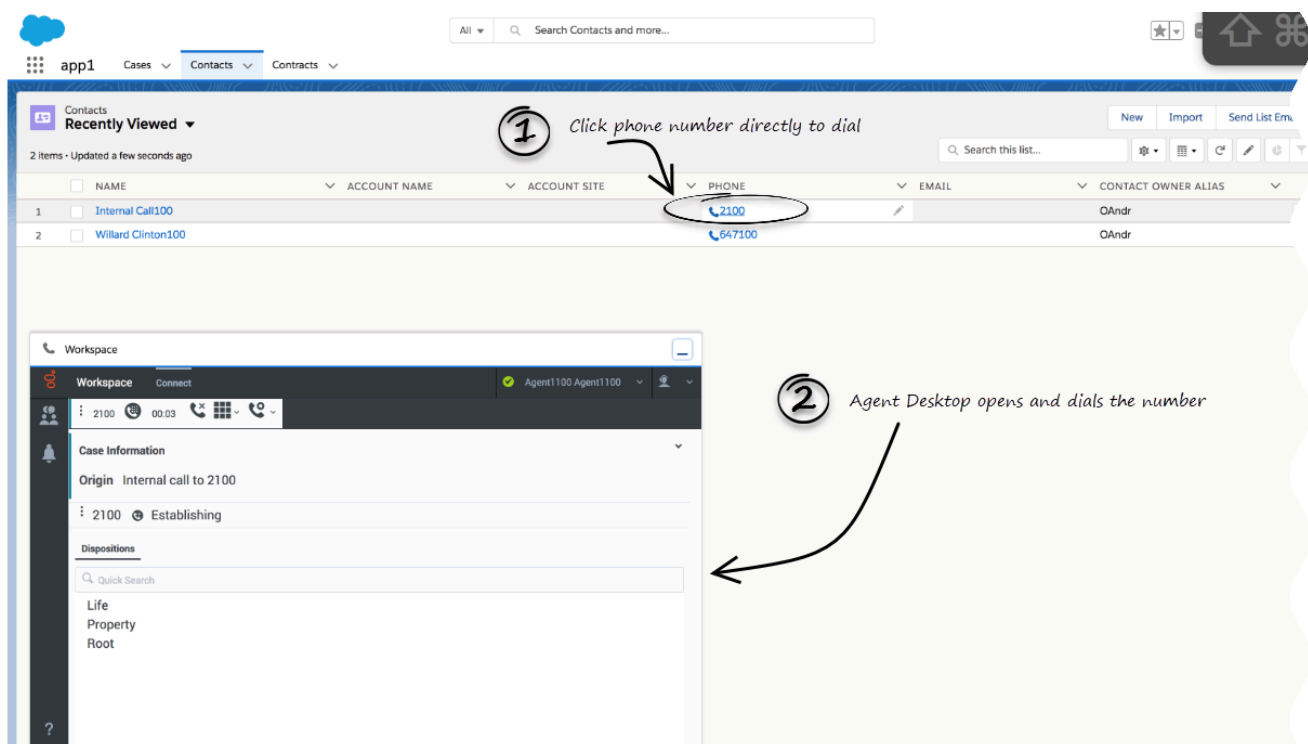
Click-to-dial

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Click-to-dial makes connecting to your customers easy. All you have to do is click their phone number to make a call.

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Using click-to-dial

The click-to-dial feature enables you to have Adapter automatically dial a call when you click a phone number in Salesforce. For example, you can search for a contact in Salesforce and then click the related phone number in the search result to dial the call.

This capability might be disabled in your account configuration by your administrator.

Related documentation

- To learn how to use Gplus Adapter, see the Genesys Agent Workspace help.

Screen Pops

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When you receive an interaction, a contact Salesforce record pops up in Salesforce.

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What are screen pops?

Screen pops are Salesforce records or other objects that display when an agent receives a call, chat, SMS, email, or other media channel interaction in Adapter. Salesforce might display one or more related records, depending on what information it has about the contact. For example, if a contact enters their case number before they talk to an agent, Salesforce displays the case automatically when you receive or make a call in Adapter. If no contact information is available, the **New Contact** dialog box or another record page is displayed (depending on how your administrator set up your account). If there are multiple records that match the screen pop, the Multiple Search view is displayed. To associate the task to that object, Select the Salesforce object.

In some configurations, such as when a new Salesforce record is created by Gplus Adapter automatically, the new record is displayed as a screen pop in Salesforce.
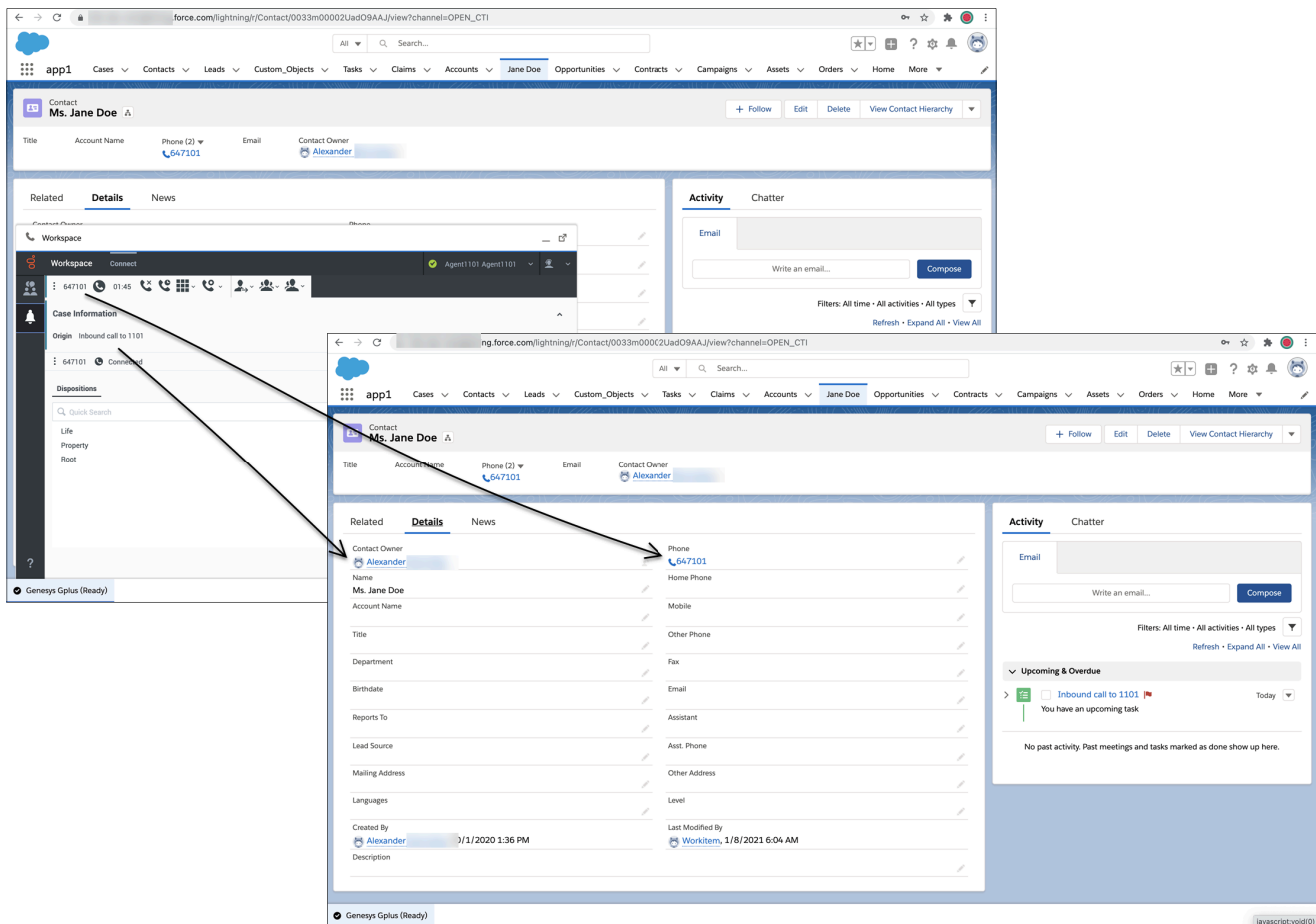
Events that trigger a Salesforce record screen pop

A Salesforce record screen pop typically triggers:

- When an interaction is initiated (ringing call)
- After you have accepted an interaction (establishing a call).
- When you make an outgoing call (dialing a call)

Your administrator sets up Gplus Adapter to trigger screen pops based on different events. The following events might trigger Salesforce record screen pops for different interaction types:

Events triggering a Salesforce record screen pop

Interaction type	Event
Voice interaction	Call ringing
	Call accepted and established (if it was previously ringing)
	Call dialing
Chat or SMS interaction.	Chat or SMS notification received (**Note**: For SMS,

Interaction type	Event
	screen pop appears only for an unassigned contact. When receiving an SMS from an assigned contact in the **Communication** tab, no screen pop is displayed)
	Chat or SMS notification accepted
Email interaction	Email notification received
	Email notification accepted
	Email reply created
	New outgoing Email created
Open media interaction	Open media (workitem) notification received
	Open media (workitem) notification accepted
Outbound interaction	Clicking **Get Record**
Outbound Push-Preview interaction	Outbound record notification accepted

Salesforce record screen pop types

Your administrator can set up different Salesforce record screen pop types for when a call is ringing or when you accept an interaction. This feature supports voice and digital channels interactions.
Adapter supports the following Salesforce record screen pop types:

- A configured Salesforce Object such as Salesforce contact.

- A Salesforce flow.

- A webpage (URL), which might open in a new tab or window.

- An object home, such as the list of recently viewed contacts.

- A Salesforce list; for example, the **All Contacts** list.

- The **Search Results** screen pop, containing the search results based on case information such as the contact name.

- The **New Account** dialog box.

> ### Important
> Screen pop by Object Type is supported only for Salesforce Lightning.

Outbound campaigns

The Outbound Campaign calling list correctly updates only if you dial from Agent Workspace. The calling list is not updated if you dial by using a click-to-dial phone number field in Salesforce because this action is not considered to be an Outbound Campaign call.

Related documentation

- To learn how to handle interactions, see the Genesys Agent Workspace help.

Activity History

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Gplus Adapter adds details about the interactions you handle works in the Salesforce contact activity history.

Related documentation:
-

Activity history for interactions

This section describes the Gplus Adapter features might be enabled for you by your administrator.

Gplus Adapter automatically creates and associates Salesforce Activity Tasks to Salesforce objects based on search results or on the active Salesforce record.

When you complete a voice, chat, SMS, email, or any other media channel interaction, Gplus Adapter might search for a corresponding record in Salesforce and link the Activity Task to the Salesforce record that matches the interaction.


Detailed information of an activity

Activities list for a contact. Click an activity to view more details.

The Activity Tasks associated with the active record is opened in Salesforce when you complete the interaction.

Gplus Adapter might display a notification that informs you when an Activity Task has been successfully associated with a Salesforce record. The notification confirms the association and the name and type of record associated with the Activity Task.

Gplus Adapter might create a Salesforce Activity Task when the screen pop is displayed. If so, the logged activity is modified when you complete the interaction.

When you complete an interaction, Gplus Adapter might display the Activity Task that was created or updated in Salesforce, as shown in the figure.
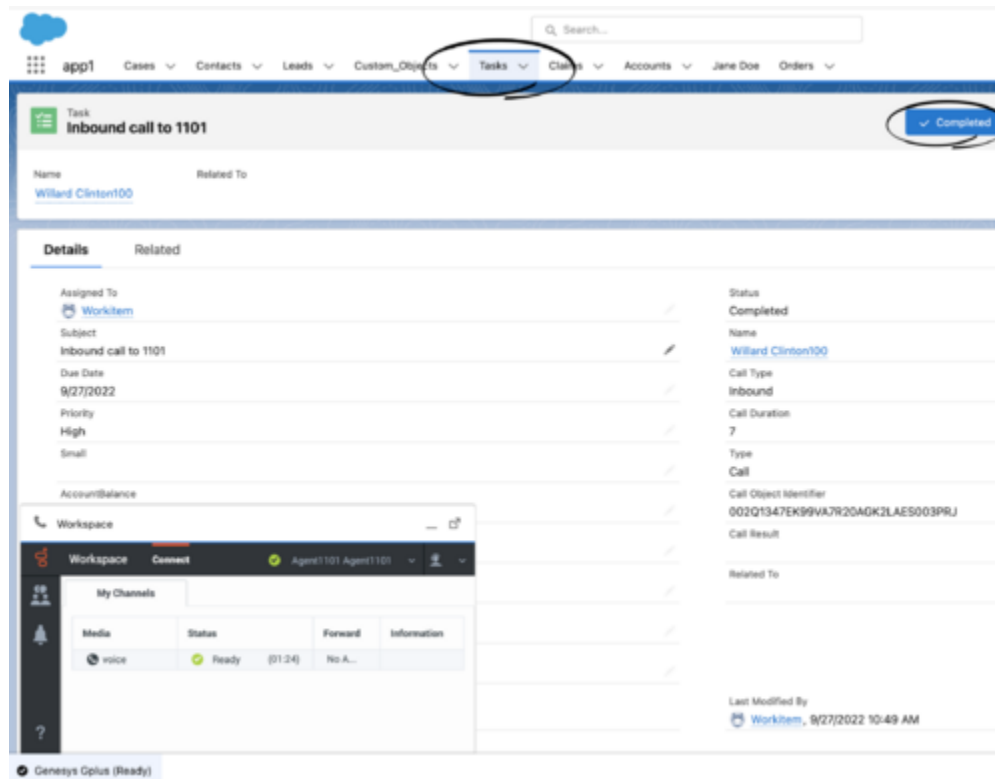
The activity history

The types of information saved in the activity history include:

- Call Duration (in seconds)

- Call Object Identifier (from call data, such as 0123456789ABCDEF)

- Call Result (Disposition from Agent Workspace)

- Call Type (such as Inbound)

- Comments (Text information integration from the following content: Subject field, Case data from Agent Workspace, Contact data, Notes added by an agent in Agent Workspace, and the content of a Chat, SMS, or Email interaction, if appropriate)

- Due Date (time stamp)

- Status (such as Completed)

- Subject (The type of interaction, direction, and so on, from Agent Workspace)

- Type (type of interaction, such as Chat)

> **Tip**
>
> - For Chat, SMS, and Open Media interactions, the **Call type** field shows all chats and SMS as **Inbound**.
>
> - For SMS, the Activity task is created only for an unassigned contact in the Agent Workspace **Communication** tab.
>
> - For emails, the **Call type** field shows **Inbound** for received emails and **Outbound** for sent emails and replies.

To view the activity history of a contact, first open the contact record from the **Contacts** tab, then navigate to the **Activity** tab. The **Activity** tab shows all the activities performed for the contact. If you do not see the latest activity, click **Refresh**.

Clicking an activity opens the **Task** tab for that item where you can see the complete details of an activity.

Voice calls, chats, or SMS that were not established are not saved in the history. When a voice call, chat, or SMS involves multiple parties, such as consultations and conferences with internal parties, Adapter creates the Salesforce activity history only when the call with the contact's is active.
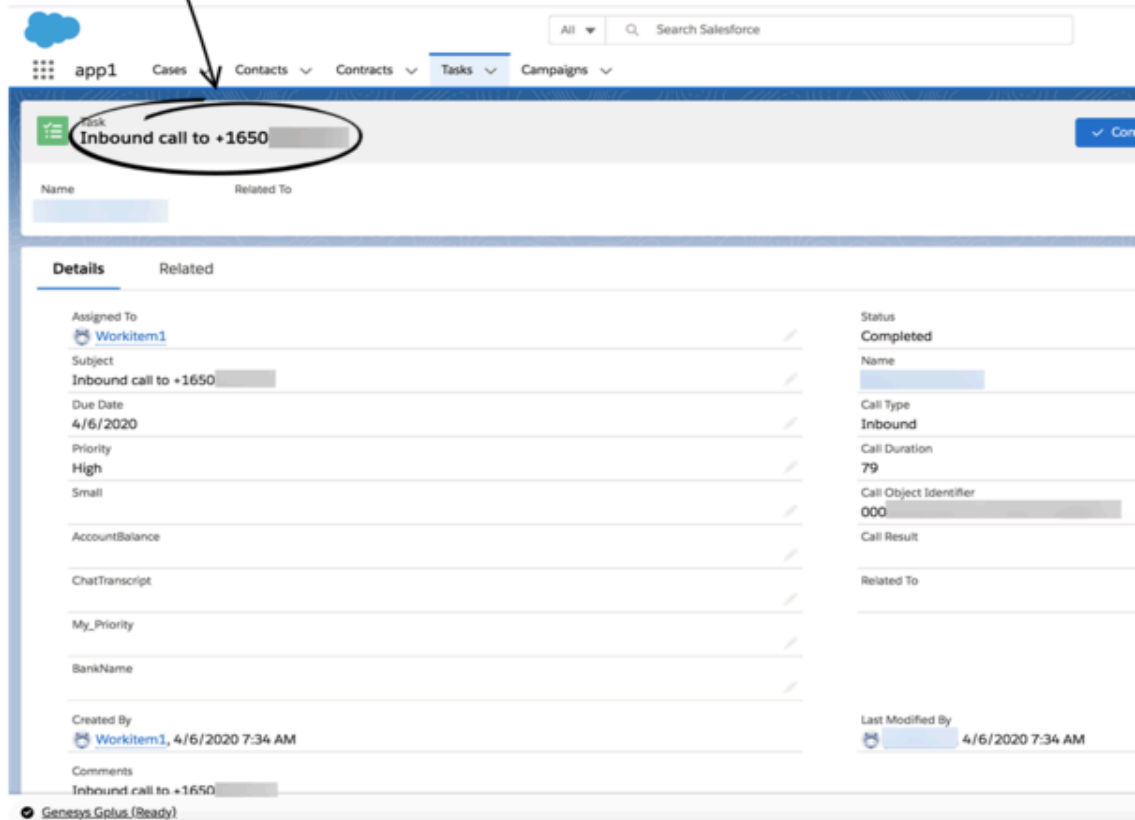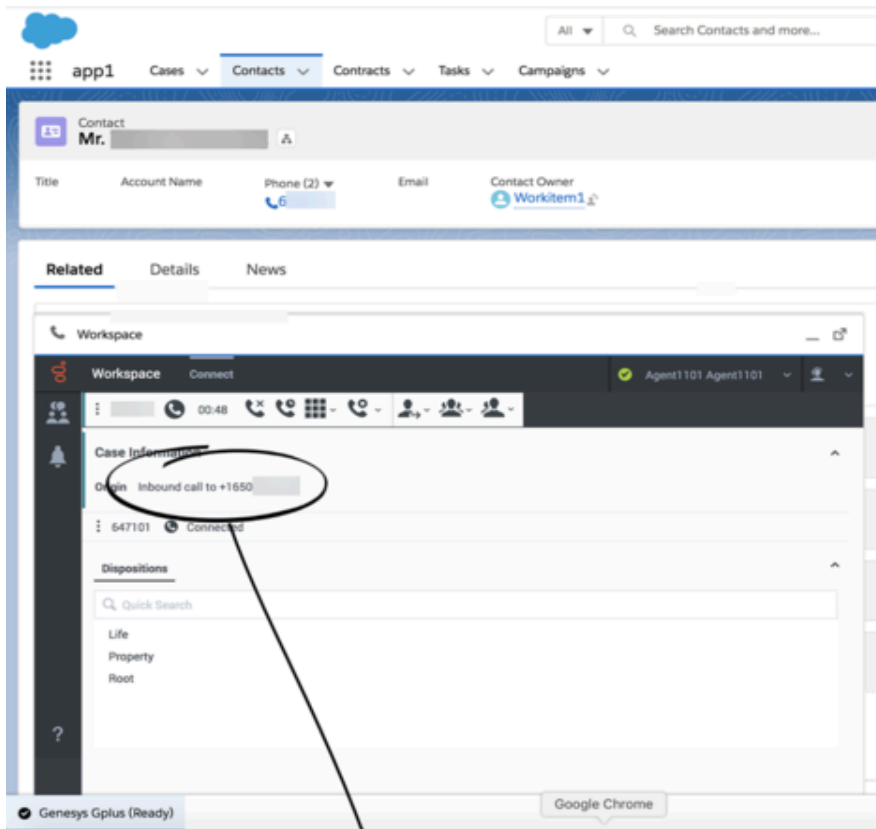
> ## Tip
>
> For Mozilla Firefox browser users, if you make a consultation call, you might not be able to enter an agent's number. This is an intermittent Salesforce known limitation. Workaround: minimize and maximize the Adapter window or click anywhere in the Salesforce window.

Object Association table

Your administrator might enable the **Object Association** table to allow you to associate your Salesforce Activity Task with one of the Salesforce records, such as a customer Contact or Case, that you open during a call while you are handling an interaction in Gplus Adapter.

When you open a Salesforce record, Gplus Adapter adds it to the **Object Association** table.

In this example, Case **0001605** and the **John Smith** and **Jane Doe** contact records were opened by Agent1101 while handling an interaction. Before completing the interaction, Agent1101 clicked the Case **0001605** row in the **Object Association** table to select it. When Agent1101 completes the interaction, Gplus Adapter associates the Activity Task for this interaction with Case **0001605**.

If you do not select a record or if you deselect a record in the **Object Association** table, Gplus Adapter uses the default method in your environment to associate the Activity Task with a Salesforce record.

New Contact creation

If the interaction you are handling is not associated with an existing contact in the Contact database, the **New Contact** record view is displayed.

Enter the contact's information in the fields of the **New Contact** view. Click **Save** to add the contact to the contact database.

Important

There might be a delay before the new contact information becomes available in the Salesforce Database and the Activity Log is correctly linked to the new contact.

Activity notifications

Gplus Adapter might be set up by your administrator to display confirmation messages to you 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.

Related documentation

- To learn how to use Gplus Adapter, see the Genesys Agent Workspace help.