Gplus Adapter for Salesforce Agent's Guide

Screen Pops

5/13/2026

Contents

- Agent

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

Related documentation:
-

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.
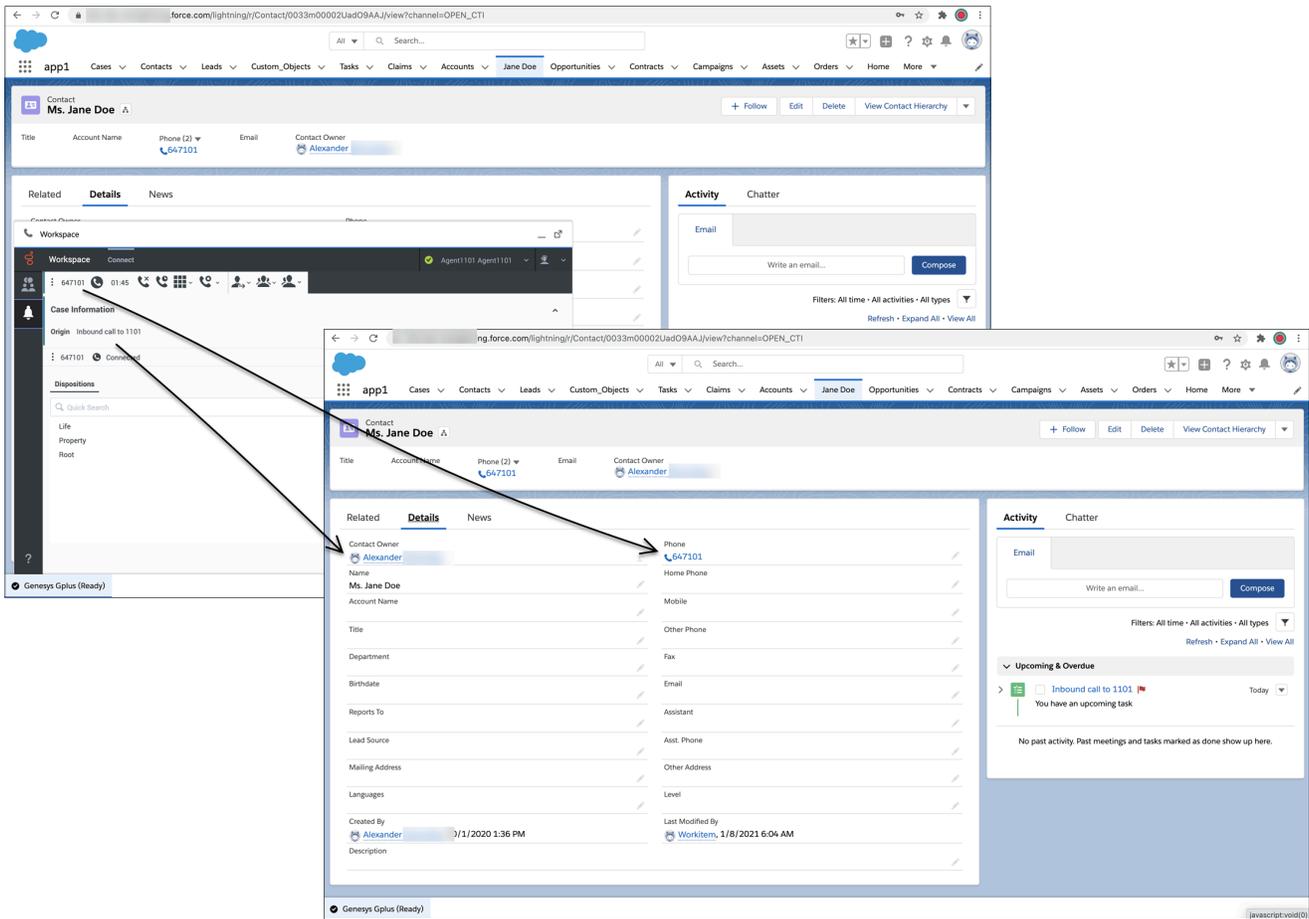
Events that trigger a Salesforce record screen pop

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.