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How Gplus Adapter for Salesforce works

-
-  Administrator
- Agent

Gplus Adapter for Salesforce enables the integration of Agent Workspace within the Salesforce environment to handle Genesys contact center interactions.

Related documentation:

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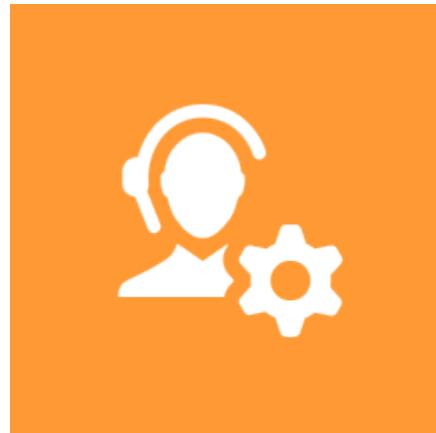
What Gplus Adapter for Salesforce does

Gplus Adapter for Salesforce enables the integration of Agent Workspace within the Salesforce environment to handle Genesys contact center interactions. The integrated solution presents a complete customer view allowing your contact center agents to service your customers. It supports Salesforce Click-to-dial, Screen Pops, and Activity History.

How Gplus Adapter for Salesforce works

You must integrate Gplus Adapter with Salesforce so that your agents can handle interactions with the Genesys Workspace Agent Workspace from within Salesforce. See the architecture diagram at the bottom of this page to see how it works.

Set up and access Gplus Adapter in Salesforce



Players: Administrators

Actions: To integrate Gplus Adapter into Salesforce, perform the Following steps:

1. (Optional) Enable Lightning in your Salesforce environment.
2. Integrate Gplus Adapter in Salesforce.
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 the Gplus Adapter features in Agent Setup.

6. Configure Gplus Adapter SSO

Gplus Adapter for Salesforce Administrator's Guide

Gplus Adapter for Salesforce options

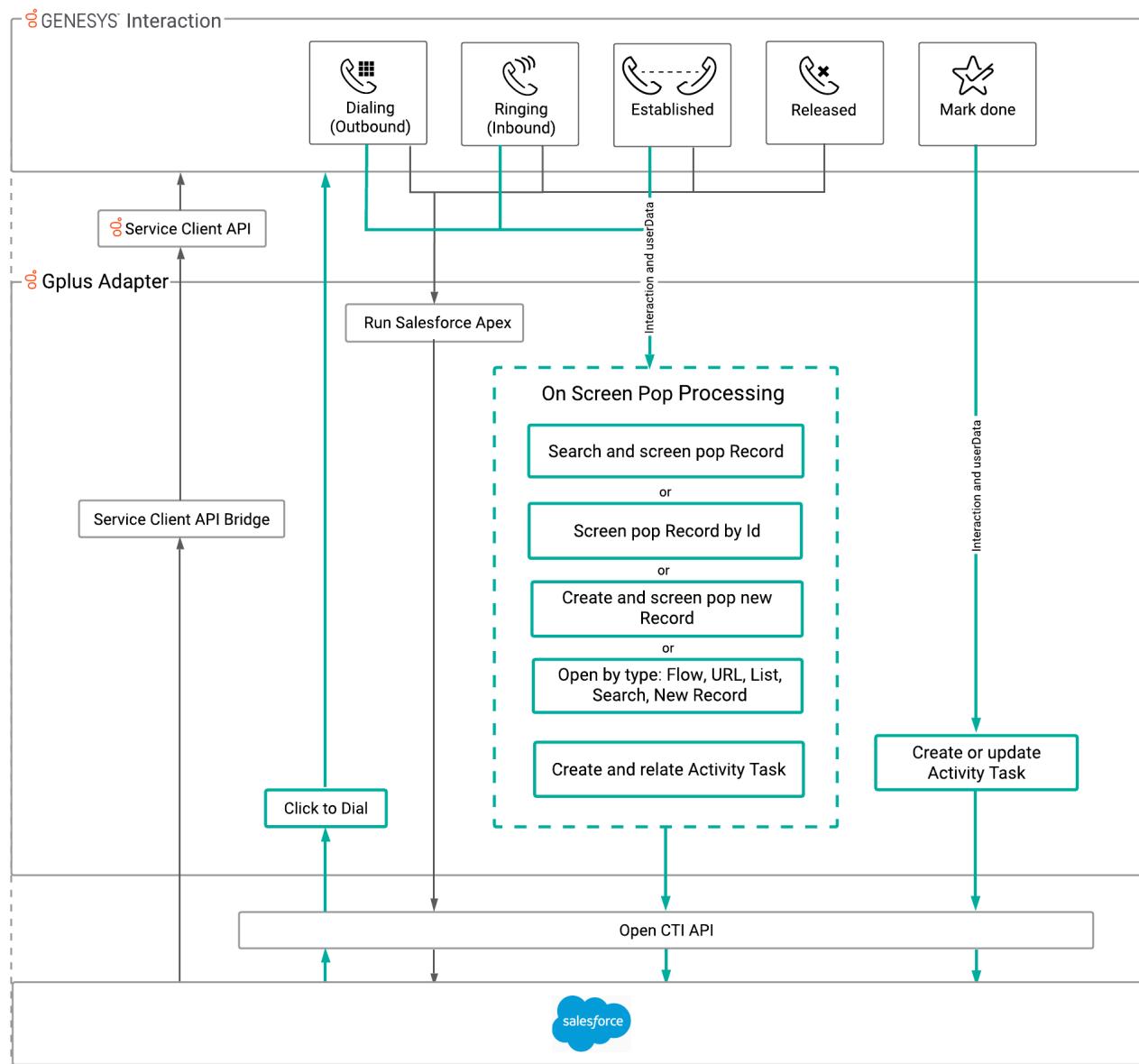
Using Gplus Adapter for Salesforce

Players: Agents

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

Gplus Adapter for Salesforce Agent's Guide

How Gplus Adapter integrates Salesforce with Genesys Interactions



Gplus Adapter for Salesforce integrates Genesys Agent Workspace (How Agent Workspace works) with five key Salesforce features:

- Screen Pop – Gplus finds, obtains, or creates a Salesforce record which is displayed as a screen pop to the user during each interaction.
- Click-to-dial – a user starts an outbound call to a phone number displayed within a Salesforce record.

- Activity Task – Gplus creates an Activity Task, also known as a Call Log, and associates the task to the Salesforce record opened by Screen Pop or Click-to-dial.
- Run Apex – Gplus (optionally) invokes the Salesforce Apex when an interaction transitions between states.
- Service Client API (SCAPI) – Salesforce (optionally) invokes the Gplus Service Client API (SCAPI).