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About Genesys Cloud for Salesforce

The Genesys Cloud for Salesforce integration is a version of Genesys Cloud's contact center services inside Salesforce.

Warning: Do not run different versions of the Genesys Cloud embedded client (Genesys Cloud for Salesforce, Genesys Cloud for Zendesk, Genesys Cloud for Chrome, Genesys Cloud for Firefox, or Genesys Cloud Embeddable Framework) side by side. Otherwise, you will experience unusual behavior with interaction logs, WebRTC phones, and other functionality.

Overview

With the Genesys Cloud for Salesforce integration, there is nothing to install on each user's computer and nothing to maintain or back up on your servers.

- [Content list](#)
- [Release notes](#)
- [Name change](#)
- [Genesys Cloud for Salesforce FAQs](#)
- [Architecture diagram](#)
- [Chrome autoplay policy changes](#)
- [Manage Genesys Cloud embedding](#)

Salesforce experience

Genesys Cloud for Salesforce works with Service Cloud, Lightning Experience, Salesforce Omni-Channel, and High Velocity Sales.

- [Service Cloud](#)
- [Lightning Experience](#)
- [Salesforce Omni-Channel](#)
- [High Velocity Sales](#)

Get started (administrators)

First review the requirements and purchase appropriate licenses for Genesys Cloud. Then install the integration and configure various settings.

- [Genesys Cloud Billing FAQs](#)
- [Requirements](#)
- [Set up the integration](#)
- [Training videos](#)

Advanced setup (customization)

Administrators can customize the integration to use more advanced features.

- [Click-to-dial on custom Visualforce pages](#)
- [Customer journey](#)
- [Screen pop](#)
- [Scripts](#)
- [Search](#)

Advanced setup (extensibility)

Administrators can extend the integration through custom development.

- [Events in Salesforce](#)
- [Example solutions](#)
- [Extension points](#)
- [SDK](#)

Campaign management

Genesys Cloud for Salesforce can use Genesys Cloud to run outbound dialing campaigns, show campaign activity, and reconcile campaign and campaign member data in Salesforce.

- [Campaign management](#)

Routing Salesforce emails

Genesys Cloud for Salesforce can route Salesforce emails that users receive through the Email-to-Case functionality.

- [Routing Salesforce emails](#)

Get started (agents)

After the integration is installed, log in and begin to use the client.

- [Browser requirements](#)
- [Access the client](#)
- [Log in to the client](#)
- [Language support](#)

Client interface

From the client, you can access the menu and change your status and phone. The menu allows you to perform common tasks quickly, such as working with active interactions, making calls, or changing settings.

- [Client interface](#)
- [Statuses](#)
- [Phones](#)

Call controls and basic interaction tasks

Learn about the call controls in the client and how to perform basic tasks on interactions.

- [Call controls](#)
- [Pick up an interaction](#)
- [Place a call on hold](#)
- [Transfer an interaction](#)
- [Schedule a callback](#)
- [Scripts](#)
- [Wrap up an interaction](#)

CRM functionality

Review CRM functionality that impacts how you work.

- [Click-to-dial](#)
- [Interaction logs](#)

Client-configurable functionality

Learn what functionality and features you can control or configure in the client.

- [Call forwarding](#)
- [Notifications](#)
- [Queue activation](#)

Call history and user inbox notifications

Quickly view your call history and notifications about various items from the User Inbox in the client. The notifications alert you to tasks and information that require your attention in Genesys Cloud.

- [Call history](#)
- [Evaluations](#)
- [Shift trade and time off requests](#)
- [Voicemail](#)

Visual engagement

Improve customer interactions with visual engagement tools that allow you to view customers' computer screens or interact with their web browsers.

- [Co-browse](#)
- [Screen share](#)

Supported Genesys Cloud interaction types

Genesys Cloud for Salesforce currently supports call, callback, outbound dialing, chat, email, message, and ACD voicemail interactions. For fuller functionality, run Genesys Cloud alongside the client.

- [Calls](#)
- [Callbacks](#)
- [Outbound dialing](#)
- [Chats](#)
- [Emails](#)
- [Messages](#)
- [Voicemail](#)

Troubleshoot

For any problems with Genesys Cloud for Salesforce, browse troubleshooting information about individual issues. Before working with Customer Care, enable server-side logging.

- [Troubleshoot Genesys Cloud for Salesforce](#)
- [Enable server-side logging](#)

Was this article helpful?

☐ Yes

☐ No

Still have questions?
[Ask the community](#)