Salesforce Deployment Guide

Installing and configuring the adapter in Salesforce

Document Control

Submitted by

Eureka Digitization and Automation Services

Internal

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Document Reviewer

Sr. No.	Document Reviewer	Reviewer Designation	Reviewers E-mail ID
1	Jaswinder Singh	CTO	Jaswinder.singh@edas.tech

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1. INSTALLING THE ADAPTER IN SALESFORCE

Complete the procedures below to install and configure the Open CTI VAANI Adapter for Salesforce in your Salesforce environment.

1.1   PREREQUISITES

- You have installed and configured Web Services.

- You have set up SSL for web server. For more information, see Configure SSL.

1.2   START

1. Open the following URL to install the latest Open CTI Adapter for Salesforce package in Salesforce:

   https://login.salesforce.com/packaging/installPackage.apexp?p0=04t41000000bSXh

   If you're not logged in, Salesforce prompts for your username and password.

2. Now you should see the **Install Open CTI 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 the adapter to specific profiles, then you can choose **Install for Specific Profiles**Click **Install**.
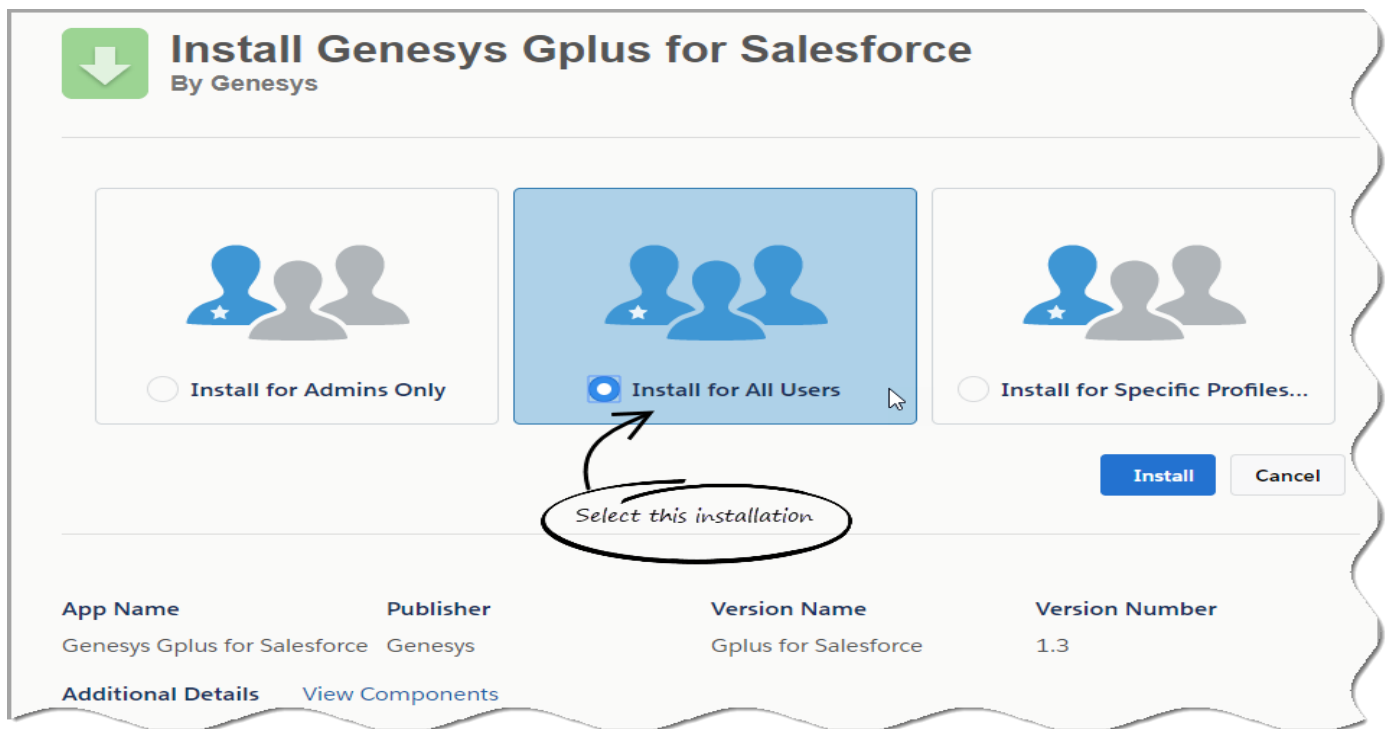
3. When you see the "Installation Complete!" message, click **Done**.

Install Genesys Gplus for Salesforce
By Genesys

ⓘ **Installation Complete!**

Done

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

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 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.   *Newly installed Gplus Adapter package*

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	AppExchange Ready
Uninstall 📥	Genesys Gplus for Salesforce	Genesys	1.3	g_gplus	9/11/2018 2:54 AM	☐	0	0	0	Passed

Uninstalled Packages

Action	Package Name		Namespace	Expiration Date	Uninstall Status	Uninstall Date
Del	Genesys Gplus for Salesforce (Version Name Gplus for Salesforce)		g_gplus	9/13/2018 2:17 AM	Uninstall Complete	9/11/2018 2:17 AM

Any previously uninstalled packages

END

2. CONFIGURING THE ADAPTER IN SALESFORCE

Complete this procedure to define your call centre in Salesforce. The call centre was created when you installed the Gplus Adapter for Salesforce package.

2.1   START

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 GWS_HOST:GWS_PORT with the correct host and port for your installation of Web Services.

    For example: https://198.51.100.23:8090/ui/crm-adapter/ index.html?crm=salesforce

    If you're enabling single sign-on in the adapter, add the authType=saml parameter to the CTI Adapter URL.

    For example: https://198.51.100.23:8090/ui/crm-adapter/ index.html?crm=salesforce&authType=saml

    You should leave the other options at their default values so the adapter works correctly in Salesforce.

Call Center Edit

Genesys Gplus for Salesforce

All Call Centers » Genesys Gplus for Salesforce

Help for this Page

Call Center Edit   Save   Cancel

General Information   ❙ = Required Information

InternalName	GenesysGplusForSalesforce
Display Name	Genesys Gplus for Salesforc
CTI Adapter URL	https://198.51.100.23:8090/ui
Use CTI API	true
Softphone Height	400
Softphone Width	200

Save   Cancel

5. Click **Save**.

6. Click **Manage Call Centre Users** and then click **Add users**.

Call Center
Genesys Gplus for Salesforce: Manage Users
Help for this Page ?

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**

	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**

7. 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 the adapter and click **Add to Call Centre**.

Call Center
Genesys Gplus for Salesforce: Search for New Users
Help for this Page ?

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-- ▼		

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

Find

	Add to Call Center	Cancel			
	Full Name	**Alias**	**Username**	**Role**	**Profile**
☐	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.

8. To access the adapter in Salesforce Classic, look for it in the left pane of your browser; in Salesforce Console, click the **Phone** button in the bottom right corner.

The adapter in Salesforce Classic.
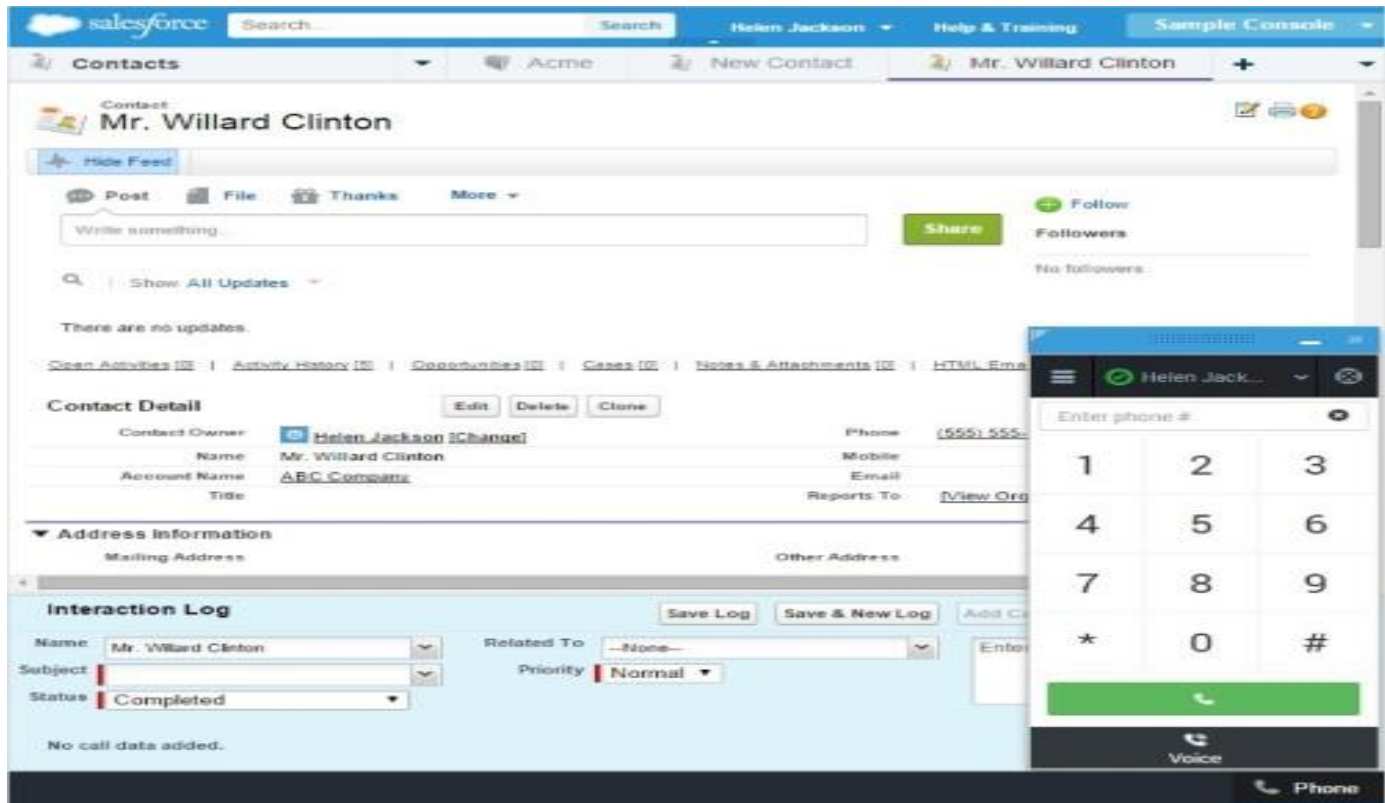
The adapter in Salesforce Console.

END

3. CONFIGURING SCREEN POPS IN SALESFORCE

When an agent receives an external call, the adapter can initiate a screen pop that causes Salesforce to show an appropriate record for the caller. To set up this functionality in Salesforce, login and go to Setup > Customize > Call Center > SoftPhone Layouts to create a SoftPhone Layout. Check out the Salesforce documentation for details about configuration.

In general, there are a couple of things to consider when you set up a SoftPhone Layout for the adapter:

- The Gplus Adapter for Salesforce ignores the SoftPhone Layout settings that control call-related fields. Instead, the adapter gets this information from Toast and case data you configure in the Genesys environment.

- Make sure you configure the Screen Pop Settings in the "CTI 2.0 or Higher Settings" section. These settings control whether the screen pop opens in a new window, tab, or Visualforce page.

See Screen pop for more information about configuring screen pops in your Genesys environment.