Workspace Plug-in for Salesforce.com
Improve agent productivity and customer experience

Benefits
- Gain seamless interoperability for your agents using Genesys Workspace and Salesforce.com
- Avoid in-house interface development costs and time delays with quick deployment and an out-of-the-box plug-in

Integration leverages customer experience platform and applications
The Genesys® Workspace Plug-in integrates with the Salesforce.com Service Cloud Console, enabling your agents to handle customer calls more quickly. Screen pops of customer records and click-to-dial outbound calling empower agents to smoothly interact with customers.

Speed call resolution and deployment
The Workspace Plug-in for Salesforce.com provides out-of-the-box, open scripting that works with both Person Accounts and Business Accounts, leveraging your investments in Workspace and Salesforce.com. In addition, you can modify specific queries and field use to meet your needs.

When Workspace starts, agents are presented the Salesforce.com browser view, creating automatic communications between the two applications. That makes it easy for them to use the capabilities of both apps. This seamless interoperability increases the call-handling capacity of your current agents.

Maintain current customer knowledge for agents
The Workspace Plug-in creates records of activity history automatically—as soon as interactions are completed—keeping activity history current. The plug-in writes a task that contains disposition and other interaction-related information, such as attached data to Salesforce.com, and applies it to the popped record. With this capability, your company improves their corporate memory of all customer interactions; agents can use that knowledge to improve the customer experience.
Genesys platform

Inbound/outbound voice, digital, intelligent Workload Distribution, SMS and social channels support

JavaScript with Apex package in Salesforce.com

Open CTI-configured Visual Force page

Scripting to create or update existing interactions in Workspace

Apex classes incorporating SOQL and SOSL commands for interaction with Salesforce.com

Support for Salesforce Business or Person Accounts

Technical specifications

Interaction Workspace version 8.1.3 or greater

Salesforce.com Service Cloud Console Integration Toolkit

Supported desktop OS

Microsoft Windows and selected browsers supported by Salesforce.com

Prerequisites

.NET Framework 3.5

VDI technology such as Citrix XenApp™ compatibility

Other

Default or dynamic ports for communications; dynamic ports required for shared presentation resources such as Citrix

Apex classes with SOQL and SOSL commands to drive Salesforce.com interaction

Synchronization through Salesforce.com tab actions to Workspace

Figure: Workspace Plug-in environment with Salesforce.com

ABOUT GENESYS

Genesys® powers more than 25 billion of the world’s best customer experiences each year. Our success comes from connecting employee and customer conversations on any channel, every day. Over 11,000 companies in more than 100 countries trust our #1 customer experience platform to drive great business outcomes. Genesys on-premise and cloud solutions are built to be fluid, instinctive and profoundly empowering. Combining the best of technology and human ingenuity, we work the way you think.

Visit us at genesys.com or call us at +1.888.436.3797

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