Providing a world-class customer experience requires responsiveness. When equipped with a single desktop that unifies all customer interactions, your sales and service staff are more responsive and helpful across all type of interactions. This means that your agents and knowledge workers have access to information about prior customer interactions and transactions. The Genesys Gplus Adapter for Salesforce is a pre-packaged integration of the Genesys Customer Experience Platform and the Salesforce suite. It unifies your contact center and CRM systems to deliver a personalized customer experience.

Designed for Salesforce CRM in either Classic or Console mode, the Gplus Adapter ensures a seamless implementation—whether in the cloud or on-premises. It provides media control, screen pop and activity history for multichannel interactions, and an outbound click-to-dial capability.

Your organization benefits from faster implementation times, decreased costs, and the smooth flow of information between the contact center and the rest of your enterprise.

Automated record display and activity update

Sales and customer service representatives need immediate access to customer data for speedy resolution of customer inquiries. The Gplus Adapter facilitates this by delivering a screen pop of relevant customer account, case, or other record types to the Salesforce CRM desktop—something that occurs simultaneously with the arrival of each interaction. Agents now have the complete context of each customer, enabling them to personalize every interaction.

Record displays include common attributes such as caller ID, customer name, and email address. They can also include data attached to the interaction, such as information collected from the IVR system or billing information from the CRM record. Multiple related records can be displayed as well. For example, if family members are linked in the CRM system, all of their records can be displayed. Or, an opportunity record could be shown, along with a case record.

An activity record is created upon conclusion of each interaction. This record contains valuable information about the contact—such as interaction type, duration, and disposition, as well as agent notes and chat transcripts and email content (where applicable).

Embedded user interface

For screen space preservation, the Gplus Adapter embeds media control within the Salesforce user interface (UI) via the Open CTI API. The media control layout in the desktop is available with both Classic and Console presentation models.

Your agent is alerted when a new interaction arrives, and they can accept the contact or work item and manage it from within the Salesforce UI. This reduces average handle time and facilitates quick, accurate response.

The Gplus Adapter also enables users to select a phone field in the Salesforce record and dial out directly through the Genesys Customer Experience Platform. An agent who needs to transfer a call or create a conference call simply selects from a list of queues or chooses an agent or back-office employee, based on their availability.
Ease of implementation and routing

Using the Salesforce Open CTI API and Genesys Web Services, all components of the Gplus Adapter are implemented within Salesforce as a 100% thin-client architecture. This serves to expedite deployment and reduces costs. The Gplus Adapter also uses Genesys real-time orchestration to assign interactions to the best available agents.

Technical specification

Capabilities
• Contact and record lookup within Salesforce
• Screen pop records within Salesforce
• Call control with answer, hold/retrieve, transfer, conference, release, and forwarding
• Preview support for inbound calls
• Embedded media control and interaction data display
• Agent-state management
• Attached data view
• Update screen pop record with disposition details
• Scripts for custom screen pops and activity history
• Post-contact disposition for Genesys reporting

Software requirements
• Explorer, Firefox, and Chrome browser support (as stated by Salesforce)
• Genesys CIM version 8.1 or later
• Genesys Web Services version 8.5 or later

Salesforce integration
• Sales or Service Cloud
• Classic or Console mode
• Screen pop of records within the Salesforce interface
• Activity creation with post-interaction disposition

Supports
• Genesys Voice with full-feature all controls
• Genesys Chat
• Genesys Email
• Genesys Outbound Preview
• Genesys Enterprise Workload Management
• Agent supervisory features including silent monitoring, whisper coaching, and barge-in
• Agent-state management with notready reason codes and after-call work reason codes
• Team Communicator for access to global and personal favorites, and agents, agent groups, and their availability statuses
• Recently dialed list

Key features
• Voice and click-to-dial call-control features
• Standard media control feature set for interactions
• Screen pop of Salesforce records using caller ID or attached data
• Task updates for interaction disposition
• Automated activity creation for contact center reporting
• Real-time agent and contact center statistics
• Contact profile and interaction history
• Built on the Open CTI API to meet Salesforce integration standards
• Differentiation of customer service with the callback option

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 10,000 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.