

# LAB-2308

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## **Building Webex Contact Center connectors: From planning and configuration to avoiding pitfalls**

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# 1. Lab

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## 1.1 Introduction

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### Task Objectives

- This page has the salesforce versions and external guides.
- How to differentiate between the versions

### 1.1.1 Resource links

---

#### 1. Salesforce - Version 1-Legacy

|                   |   |
|-------------------|---|
| Integration Guide | <a href="https://www.salesforce.com/products/free-trial/developer](https://help.webex.com/en-us/article/nhxw7kfb/Integrate-Webex-Contact-Center-with-Salesforce-(Version-1%E2%80%94Legacy)/">https://www.salesforce.com/products/free-trial/developer](https://help.webex.com/en-us/article/nhxw7kfb/Integrate-Webex-Contact-Center-with-Salesforce-(Version-1%E2%80%94Legacy)/</a> |
| Latest Updates    | <a href="https://help.webex.com/en-us/article/nhxw7kfb/Integrate-Webex-Contact-Center-with-Salesforce-(Version-1%E2%80%94Legacy)#concept-template_ac93b49e-a5eb-4942-a734-26c8da471aae/">https://help.webex.com/en-us/article/nhxw7kfb/Integrate-Webex-Contact-Center-with-Salesforce-(Version-1%E2%80%94Legacy)#concept-template_ac93b49e-a5eb-4942-a734-26c8da471aae/</a>         |

#### 2. Salesforce - Version 2-New

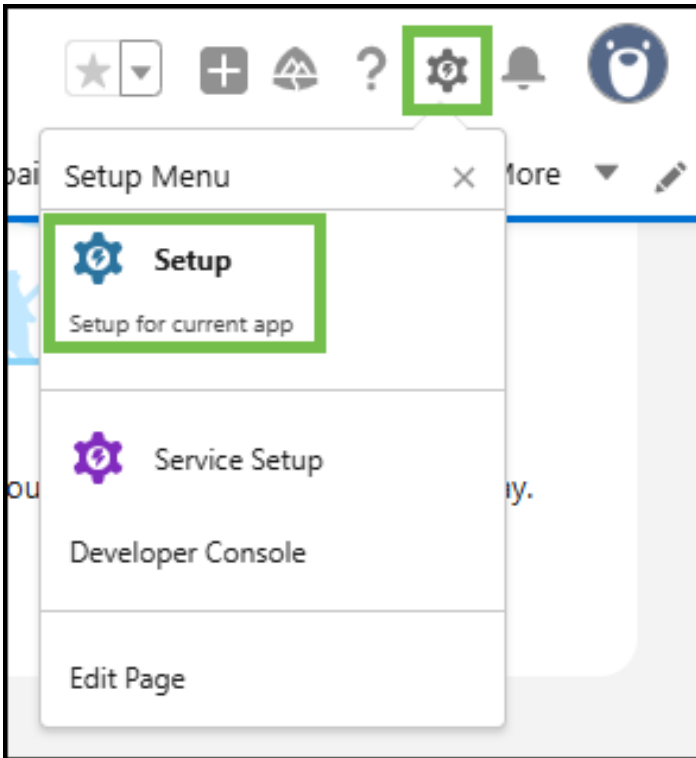
|                   |   |
|-------------------|---|
| Integration Guide | <a href="https://help.webex.com/en-us/article/dyidod/Integrate-Webex-Contact-Center-with-Salesforce-(Version-2-New)/">https://help.webex.com/en-us/article/dyidod/Integrate-Webex-Contact-Center-with-Salesforce-(Version-2-New)/</a>   |
| Access Guide      | <a href="https://help.webex.com/en-us/article/n08vfjcb/Access-and-use-Webex-Contact-Center-within-Salesforce-(Version-2-New)/">https://help.webex.com/en-us/article/n08vfjcb/Access-and-use-Webex-Contact-Center-within-Salesforce-(Version-2-New)/</a>                       |
| Latest Updates    | <a href="https://help.webex.com/en-us/article/dyidod/Integrate-Webex-Contact-Center-with-Salesforce-(Version-2-New)#concept_d3z_st5_hgc/">https://help.webex.com/en-us/article/dyidod/Integrate-Webex-Contact-Center-with-Salesforce-(Version-2-New)#concept_d3z_st5_hgc/</a> |

#### 3. Differentiate between versions

|       |   |
|-------|---|
| Guide | <a href="https://techzone.cisco.com/t5/Contact-Center-3rd-Party/Playbook-CRM-Connector-Version-Matrix-Install-Store-Link/ta-p/16910365/">https://techzone.cisco.com/t5/Contact-Center-3rd-Party/Playbook-CRM-Connector-Version-Matrix-Install-Store-Link/ta-p/16910365/</a> |
|-------|---|

#### 4. Installed Package Verification

- In Salesforce, navigate to '**Setup**' by clicking the gear icon in the top-right corner and selecting '**Setup**'.



- In the Salesforce portal, navigate to **Apps > Packaging > Installed Packages** (or type *Installed Packages* in the search bar above the left-hand menu).

Search Setup

Setup Home Object Manager

Installed Packages

Installed Packages

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 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.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

| Action    | Package Name                        | Publisher             | Version Number | Namespace Prefix | Install Date        | Limits                              |
|-----------|-------------------------------------|-----------------------|----------------|------------------|---------------------|-------------------------------------|
| Uninstall | Webex Contact Center for Salesforce | cisco.com             | 1.1            | cisco_wxcc       | 3/25/2026, 9:08 AM  | <input type="checkbox"/>            |
| Uninstall | Developer Edition                   | Salesforce Developers | 0.9            | devedapp         | 3/16/2026, 10:08 AM | <input checked="" type="checkbox"/> |

## 1.2 Integrate Webex Contact Center with Salesforce Using the Legacy CRM Connector

Please use the following credentials to complete the tasks:

|                              |   |
|------------------------------|---|
| Control Hub                  | <a href="https://admin.webex.com">https://admin.webex.com</a>   |
| Salesforce                   | <a href="https://login.salesforce.com/">https://login.salesforce.com/</a>   |
| Salesforce Developer Edition | Sign up link: <a href="https://www.salesforce.com/products/free-trial/developer/">https://www.salesforce.com/products/free-trial/developer/</a> |

### Task Objectives

- Define and configure the Call Center in Salesforce and add users.
- Create a softphone layout and set screen pop preferences.
- Add the Webex Contact Center softphone to the Salesforce Sales app.
- Test the Webex Contact Center softphone integration in Salesforce.

### 1.2.1 1. Create Salesforce Trial Account

- Navigate to Salesforce Developer portal: <https://www.salesforce.com/products/free-trial/developer/> and log in and create an account

### Note

Trial account only expires if its not logged in atleast once in 45 days.

### 1.2.2 2. Configure Legacy Connector

### Attention

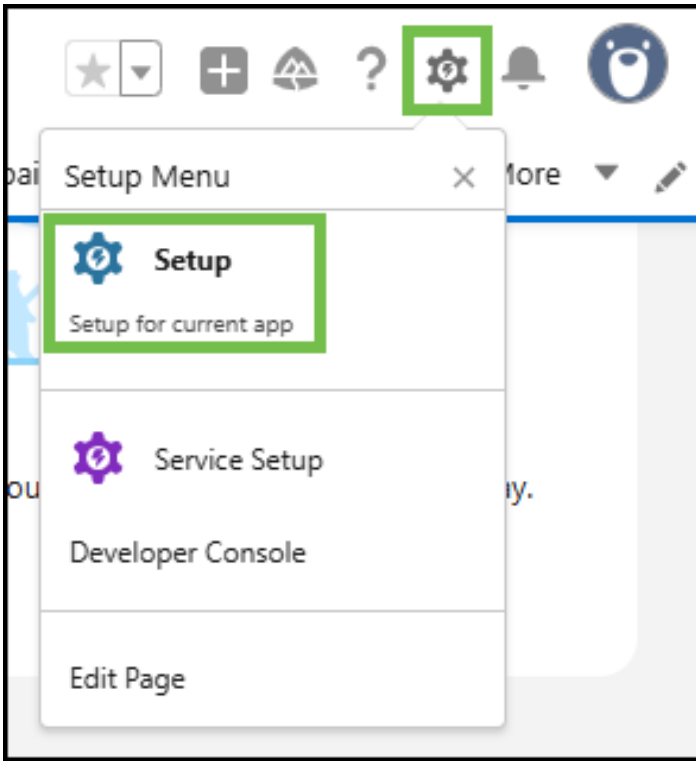
Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

- Please use the "integrate" section of the guide for step by step installation [https://help.webex.com/en-us/article/nhxw7kfb/Integrate-Webex-Contact-Center-with-Salesforce-\(Version-1%E2%80%94Legacy\)#Cisco\\_Task\\_in\\_List\\_GUI.dita\\_6e0e23f7-7df8-4a52-872a-af63dff16f5c/](https://help.webex.com/en-us/article/nhxw7kfb/Integrate-Webex-Contact-Center-with-Salesforce-(Version-1%E2%80%94Legacy)#Cisco_Task_in_List_GUI.dita_6e0e23f7-7df8-4a52-872a-af63dff16f5c/)
- Congratulations! You have complete the task.

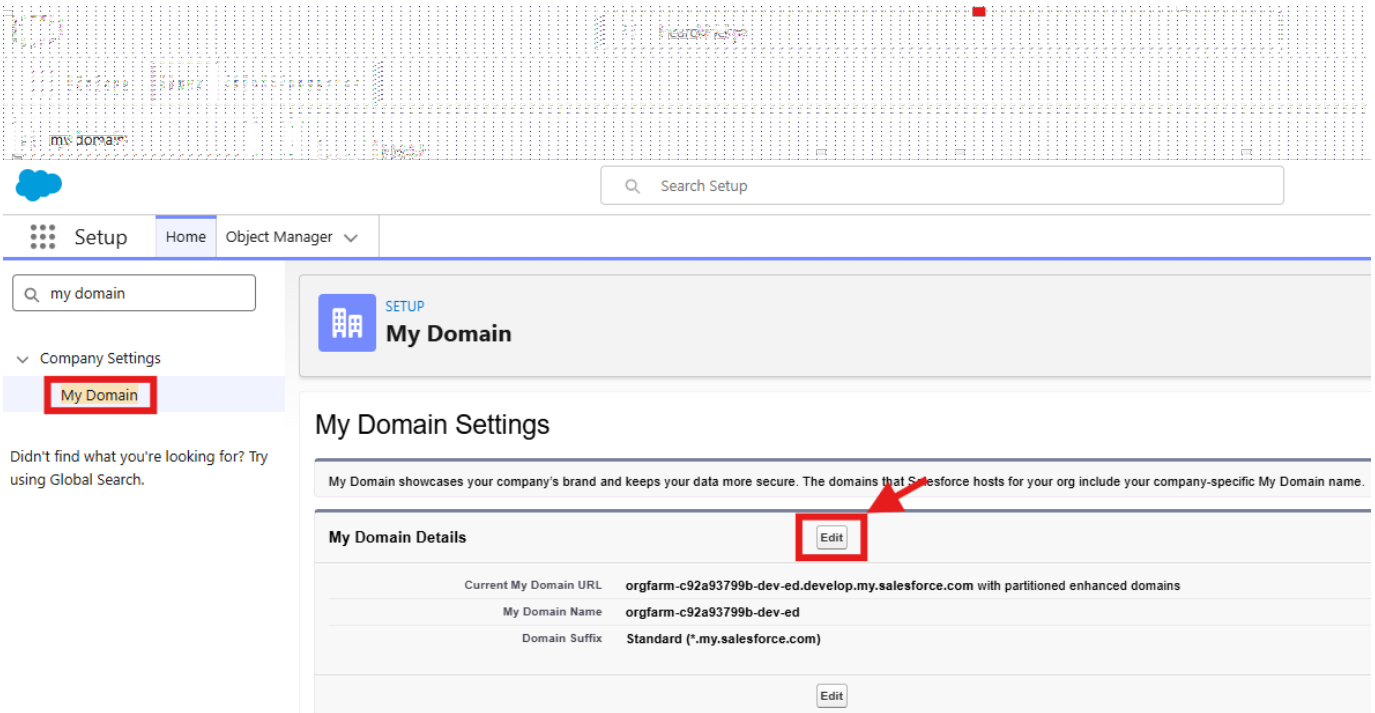
### 1.2.3 3. (Optional step) Update the Salesforce Domain

To update the domain (to something that you can remember or differentiate) you can follow the below steps

- In Salesforce, navigate to **'Setup'** by clicking the gear icon in the top-right corner and selecting **'Setup'**.



- Navigate to '**Company Settings > My Domain**' (or type *My Domain* in the search bar above the left-hand menu) and hit **Edit**



- Enter the **My Domain Name**, select **Check Availability** and **Save**

## My Domain Settings

My Domain showcases your company's brand and keeps your data more secure. The domains that Salesforce hosts for your org include your company-specific My Domain name.

---

**My Domain Details** Save Cancel

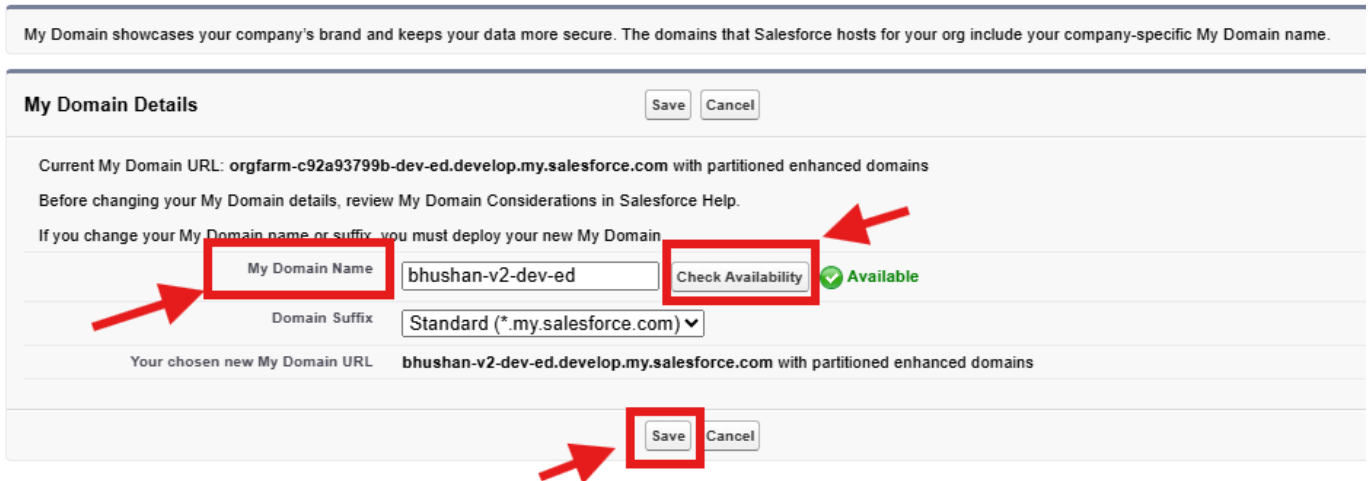
Current My Domain URL: **orgfarm-c92a93799b-dev-ed.develop.my.salesforce.com** with partitioned enhanced domains  
Before changing your My Domain details, review My Domain Considerations in Salesforce Help.

If you change your My Domain name or suffix, you must deploy your new My Domain.

|                |   |                    |             |
|----------------|---|--------------------|-------------|
| My Domain Name | <input type="text" value="bhushan-v2-dev-ed"/>              | Check Availability | ✓ Available |
| Domain Suffix  | <input type="text" value="Standard (*.my.salesforce.com)"/> |                    |             |

Your chosen new My Domain URL: **bhushan-v2-dev-ed.develop.my.salesforce.com** with partitioned enhanced domains

Save Cancel



- Deploy the domain (this steps will take up to 15 mins minutes to complete but you receive an email once complete)

## 1.3 Integrate Webex Contact Center with Salesforce Using the New CRM Connector

---

|                              |   |
|------------------------------|---|
| Control Hub                  | <a href="https://admin.webex.com">https://admin.webex.com</a>   |
| Salesforce                   | <a href="https://login.salesforce.com/">https://login.salesforce.com/</a>   |
| Salesforce Developer Edition | Sign up link: <a href="https://www.salesforce.com/products/free-trial/developer/">https://www.salesforce.com/products/free-trial/developer/</a> |

### Task Objectives

- Define and configure the Call Center in Salesforce and add users.
- Create a softphone layout and set screen pop preferences.
- Add the Webex Contact Center softphone to the Salesforce Sales app.
- Test the Webex Contact Center softphone integration in Salesforce.

### 1.3.1 1. Create Salesforce Trial Account

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- Navigate to Salesforce Developer portal: <https://www.salesforce.com/products/free-trial/developer/> and log in and create an account

### Note

Trial account only expires if its not logged in atleast once in 45 days.

### 1.3.2 2. Install the Version 2 package

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- To install the Version 2 package navigate to this link.
- Login with the credentials created in step 1 and select **Install for All Users** and select **Install**.

## Install Webex Contact Center for Salesforce

By cisco.com

Install for Admins Only

Install for All Users

Install for Specific Profiles...

Install
Cancel

| App Name                            | Publisher | Version Name | Version Number |
|-------------------------------------|-----------|--------------|----------------|
| Webex Contact Center for Salesforce | cisco.com | ver 1.1      | 1.1            |

**Description**  
Free, cloud-based pre-built CTI integration into Salesforce

**Additional Details** [View Components](#)

### 1.3.3.3. Configure Call Center

#### Attention

Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

- Navigate to Salesforce portal and log in with the credentials provided.
- Visit the Github repository to download the latest call center definition file - <https://github.com/webex/webex-contact-center-crm-connectors/blob/main/salesforce/cti/OpenCTI.callCenter-meta.xml> (click '**Download raw file button**').

[webex-contact-center-crm-connectors](#) / [salesforce](#) / [OpenCTI.callCenter-meta.xml](#)

**damathie-cisco** Initial Salesforce commit 266c1c4 · 7 months ago

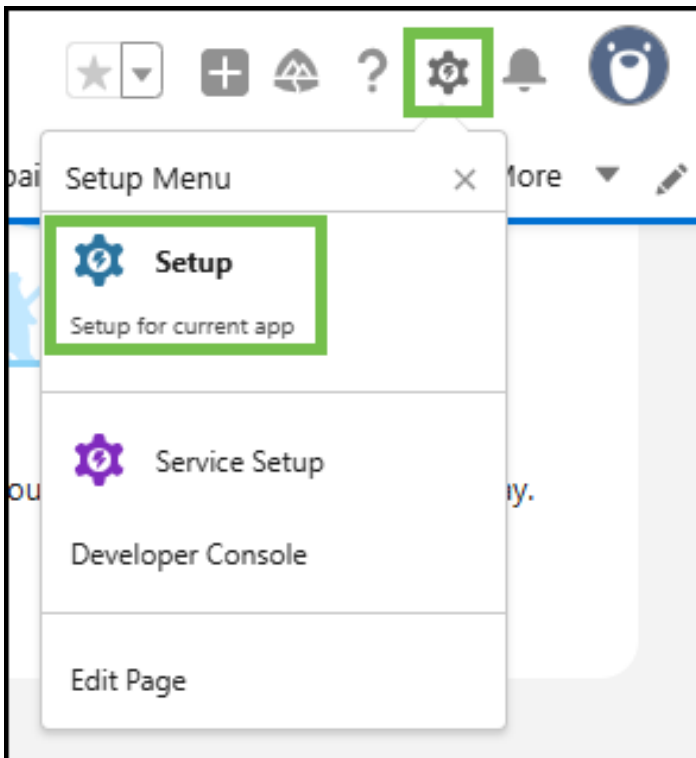
50 lines (50 loc)...

Code Blame Raw Download

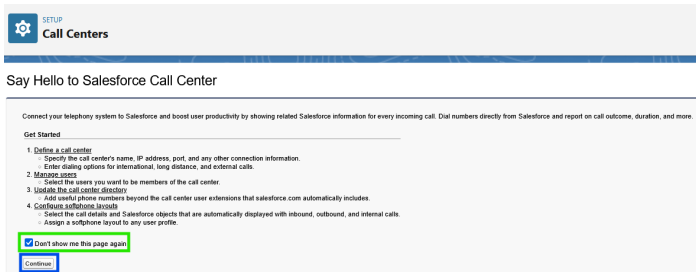
```

1 <?xml version="1.0" encoding="UTF-8"?>
2 <callCenter xmlns="http://soap.sforce.com/2006/04/metadata">
```

- In Salesforce, navigate to '**Setup**' by clicking the gear icon in the top-right corner and selecting '**Setup**'.



- In the Salesforce portal, navigate to '**Feature Settings > Service > Call Center > Call Centers**' (or type *Call Centers* in the search bar above the left-hand menu).
- Select **Don't show me this page again** and hit **Continue**.



- Click '**Import**', select '**Browse**' and choose the call center definition file (downloaded earlier).
- Click '**Import**' again to save the added file.

The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Setup' menu is open, and 'Call Centers' is highlighted under the 'Call Center' section. The main content area displays the 'All Call Centers' page, which includes a table with columns for Name, Version, Created Date, and Last Modified Date. The table currently shows 'No records to display.' An 'Import' button is highlighted with a green box above the table.

## Call Center Import

To create your first call center record for a CTI adapter that was just installed, import the adapter's default XML call center definition file, and is typically named after the type of CTI system that the adapter supports (for example, "CiscoIPCC

The screenshot shows the 'New Call Center Import Information' dialog box. It has an 'Import' button and a 'Cancel' button at the top right. The 'Call Center Definition File' field contains the text 'OpenCTI.callCenter-meta.xml'. A green arrow points to the 'Browse...' button, and another green arrow points to the 'Import' button at the bottom right.

- After the call center definition file is imported, edit it by clicking '**Edit**'.
- Change '**WxCC Region**' to '**us1**'.

### Note

The region defined here should match your Webex Contact Center region (i.e. ca1, anz1, eu1 etc.).

**Call Center Detail**

[Edit](#) [Delete](#) [Clone](#)

**WxCC Settings**

WxCC Region **us1**  
 WxCC WebRTC Domain

**General Information**

Internal Name wxCcCallCenter  
 Display Name WxCC Call Center  
 Description Webex Contact Center Salesforce Integration

- Click 'Save'.
- Add users to the Call Center:
- Click 'Manage Call Center Users' at the bottom of the page and then 'Add More Users'.
- Click 'Find', select the lab user in use (*labuserID@wx1.wbx.ai*), and click 'Add to Call Center'.

## Call Center Users

Manage Call Center Users

### Call Center Users by Profile

Total 0

Call Center [Help for this Page](#) ?

## WxCC Call Center: Search for New Users

[All Call Centers](#) » [WxCC Call Center](#) » [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.

|                                       |                                       |                      |     |
|---------------------------------------|---------------------------------------|----------------------|-----|
| <input type="text" value="--None--"/> | <input type="text" value="--None--"/> | <input type="text"/> | AND |
| <input type="text" value="--None--"/> | <input type="text" value="--None--"/> | <input type="text"/> | AND |
| <input type="text" value="--None--"/> | <input type="text" value="--None--"/> | <input type="text"/> | AND |
| <input type="text" value="--None--"/> | <input type="text" value="--None--"/> | <input type="text"/> | AND |
| <input type="text" value="--None--"/> | <input type="text" value="--None--"/> | <input type="text"/> | AND |

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: 5/11/2025
- For date/time fields, enter the value in following format: 5/11/2025, 11:21 AM

Find

Add to Call Center [Cancel](#)

|                                     | Full Name        | Alias | Username                                | Role | Profile                          |
|-------------------------------------|------------------|-------|---|------|----------------------------------|
| <input type="checkbox"/>            | User_Integration | integ | integration@00das00000oznibmac.com      |      | Analytics Cloud Integration User |
| <input type="checkbox"/>            | User_Security    | sec   | insightssecurity@00das00000oznibmac.com |      | Analytics Cloud Security User    |
| <input checked="" type="checkbox"/> | User_User        | UUser | test-jmpirh34tunj@example.com           |      | System Administrator             |

### 1.3.4.4. Configure Softphone Layout

- Navigate to '**Feature Settings > Service > Call Center > Softphone Layouts**' (or type *Softphone Layouts* in the search bar above the left-hand menu).
- Click '**New**'.

The screenshot shows the Salesforce Setup interface for 'Softphone Layouts'. The left-hand navigation menu is expanded to show 'Softphone Layouts' under the 'Call Center' section. The main content area displays the 'Softphone Layouts' page, which includes a description of softphones and a table of existing layouts. A 'New' button is highlighted in green, indicating the next step in the configuration process.

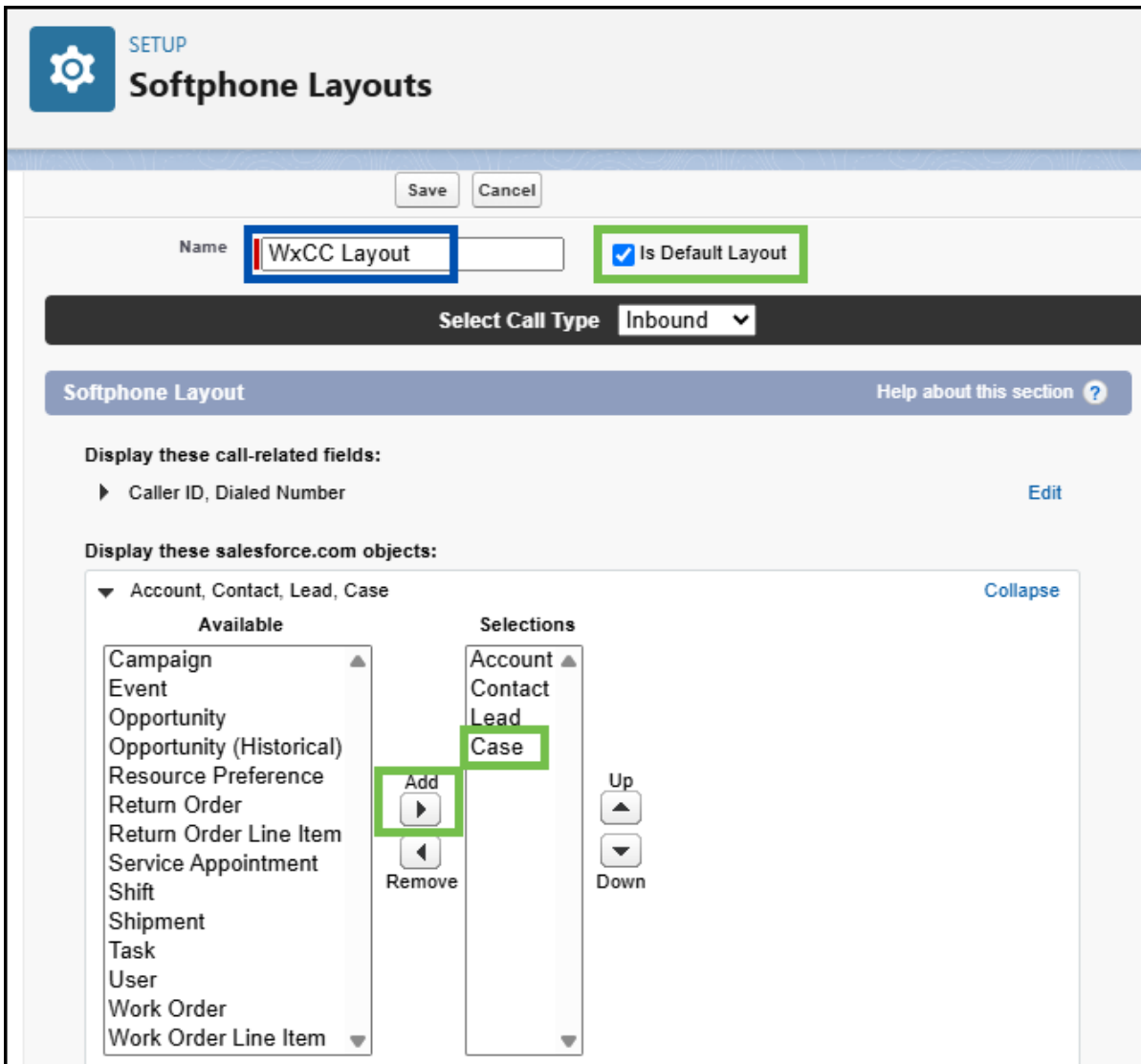
| Action               | Name ↑                    | Default                             | Created By Alias | Created Date        | Last Modified By Alias | Last Modified Date  |
|----------------------|---------------------------|-------------------------------------|------------------|---------------------|------------------------|---------------------|
| <a href="#">Edit</a> | Standard Softphone Layout | <input checked="" type="checkbox"/> | UUser            | 5/11/2025, 11:20 AM | UUser                  | 5/11/2025, 11:20 AM |

- Provide a name for the '**Softphone Layout**' (e.g., *WxCC layout*).
- Select the '**Is Default Layout**' checkbox.
- Under '**Display these salesforce.com objects**', click on '**Add/Remove Objects**' and add 'Case'.

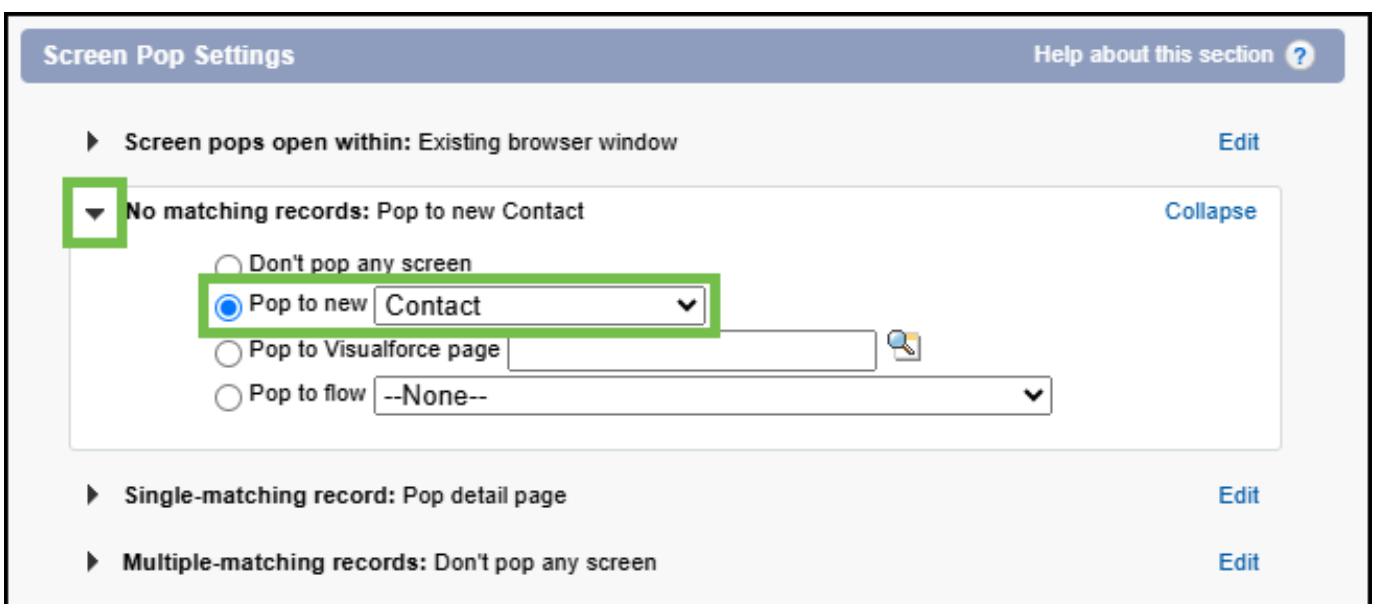
The screenshot shows the 'Display these salesforce.com objects' section in the configuration. It lists the objects 'Account', 'Contact', and 'Lead'. A green box highlights the 'Add / Remove Objects' button, which is used to select the objects to be displayed in the softphone layout.

**Display these salesforce.com objects:**

- ▶ Account, Contact, Lead [Add / Remove Objects](#)
- ▶ **If single Account found, display:** Account Name  
If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed. [Edit](#)
- ▶ **If single Contact found, display:** Name  
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed. [Edit](#)
- ▶ **If single Lead found, display:** Name  
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed. [Edit](#)



- Under 'Screen Pop Settings', expand 'No matching records', select 'Pop to new', and choose 'Contact'.



**Note**

Other Salesforce objects can be selected here as well. **'Contact'** is used as an example in this exercise.

- Click **'Save'** at the top.

### 1.3.5 5. Configure CTI Softphone

- Navigate to **'Apps > App Manager'** (or type *App Manager* in the search bar above the left-hand menu).
- For the **'Sales'** app (line number 22; **'LightningSales'** developer) click **'Edit'** on the right-hand side.

Setup Home Object Manager

App Manager

App Manager

External Client Apps

External Client App Manager

Didn't find what you're looking for? Try using Global Search.

SETUP Lightning Experience App Manager

New Lightning App New External Client App

26 items - Sorted by App Name - Filtered by All appmenuitems - TabSet Type, App Type

|    | App Name ↑         | Developer Name        | Description  | Last Modifie...      | Ap...     | Vi... |
|----|--------------------|-----------------------|--|----------------------|-----------|-------|
| 14 | My Service Journey | MSJApp                | Discover new customer service capabilities.                        | 9/8/2025, 11:50 A... | Lightning | ✓     |
| 15 | Platform           | Platform              | The fundamental Lightning Platform                                 | 9/8/2025, 11:50 A... | Classic   |       |
| 16 | Queue Management   | QueueManagement       | Create and manage queues for your business.                        | 9/8/2025, 11:50 A... | Lightning | ✓     |
| 17 | Sales              | Sales                 | The world's most popular sales force automation (SFA) solution     | 9/8/2025, 11:50 A... | Classic   |       |
| 18 | Sales              | LightningSales        | Manage your sales process with accounts, leads, opportunities...   | 9/8/2025, 11:50 A... | Lightning | ✓     |
| 19 | Sales Cloud Mobile | SalesCloudMobile      | New seller focused mobile first experience                         | 9/8/2025, 11:50 A... | Lightning | Edit  |
| 20 | Sales Console      | LightningSalesConsole | (Lightning Experience) Lets sales reps work with multiple recor... | 9/8/2025, 11:50 A... | Lightning | ✓     |

- In the next window, select **'Utility Items (Desktop Only)'**.
- Click **'Add Utility item'** and choose **'Open CTI Softphone'**.

**App Settings**

- App Details & Branding
- App Options
- Utility Items (Desktop Only)**
- Navigation Items
- User Profiles

**Utility Items (Desktop Only)**

Give your users quick access to productivity t

**Add Utility Item**

Search...

- List View
- LWC CRM Analytics Dashboard
- Macros
- My Appointments
- Notes
- Omni-Channel
- Open CTI Softphone**
- Quip Associated Documents
- Quip Notifications
- Recent Items
- Report Chart
- Rich Text

- Select **'Add Utility item'** and choose **'Omni-Channel'**.

The screenshot shows the Lightning App Builder interface for configuring utility items. The top navigation bar includes a back arrow, 'Lightning App Builder', 'App Settings', 'Pages', and 'Sales'. The left sidebar shows 'App Settings' with sub-items: 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)' (highlighted in green), 'Navigation Items', and 'User Profiles'. The main content area is titled 'Utility Items (Desktop Only)' and includes the instruction: 'Give your users quick access to productivity tools and add background utility items to your app.' Below this is an 'Add Utility Item' button (highlighted in green) and a 'Utility Bar Alignment' dropdown set to 'Default'. A dropdown menu is open, showing a search bar and a list of utility items: 'Macros', 'My Appointments', 'Notes', 'Omni-Channel' (highlighted in green), 'Open CTI Softphone', 'Quip Associated Documents', 'Quip Notifications', 'Recent Items', 'Report Chart', 'Rich Text', and 'runtime\_cdp:dataModelTab'. To the right, the 'PROPERTIES' panel for 'Open CTI Softphone' is visible, showing 'Utility Item Properties' with fields for 'Label' (Phone), 'Icon' (call), 'Panel Width' (340), 'Panel Height' (480), and a checked 'Start automatically' checkbox.

- Click '**Save**' and return to the previous page by clicking the back arrow icon at the top left corner.

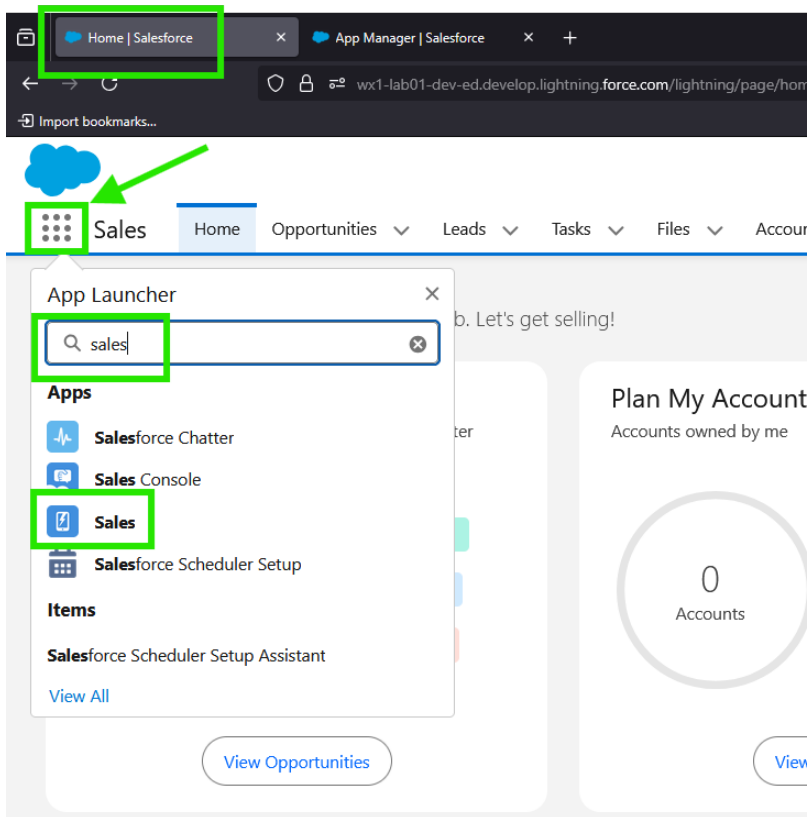
The screenshot displays the Salesforce Lightning App Builder interface. At the top, a dark blue navigation bar contains a back arrow, the 'Lightning App Builder' icon (highlighted with a green box), 'App Settings', 'Pages', and 'Sales'. The left sidebar, under 'App Settings', lists 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)' (highlighted with a blue bar), 'Navigation Items', and 'User Profiles'. A green arrow points to the 'App Settings' header. The main content area, titled 'Utility Items (Desktop Only)', includes an 'Add Utility Item' button, a 'Utility Bar Alignment' dropdown, and a list of utility items: 'Omni-Channel', 'Phone', and 'To Do List'. To the right of the list is a 'PROPERTIES' panel for the selected 'Omni-Channel' item, showing fields for 'Label', 'Icon', 'Panel Width', 'Panel Height', and a checked 'Start' option.

### 1.3.6 6. Testing

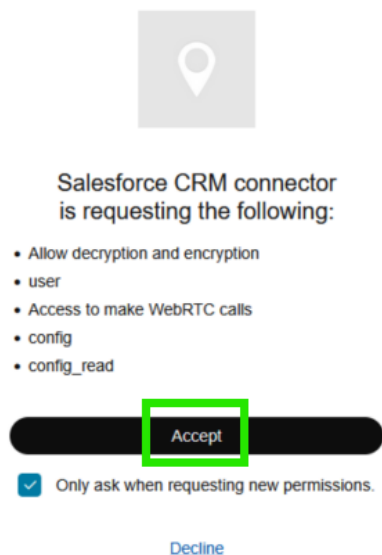
#### Attention

Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

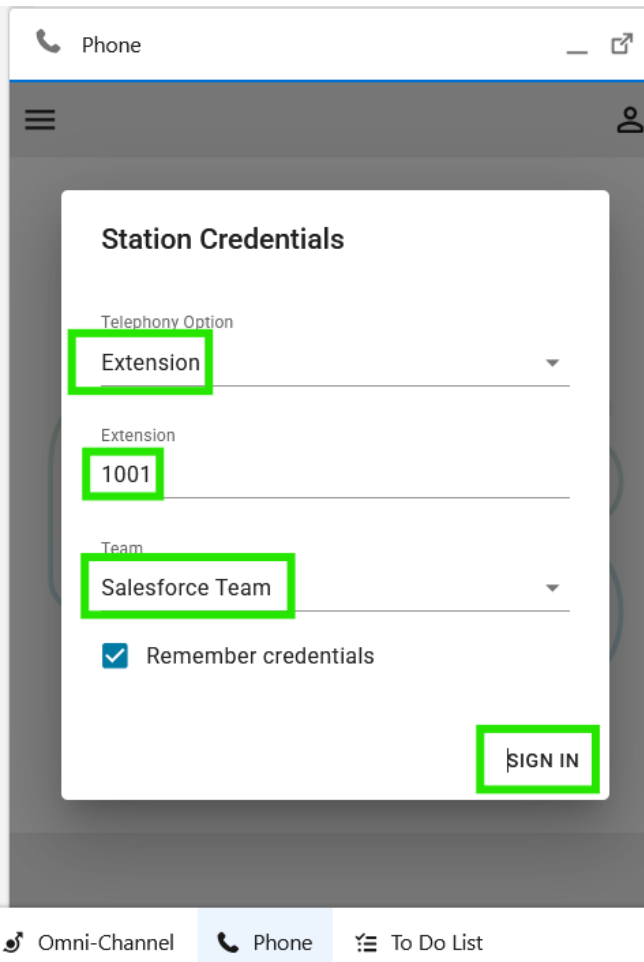
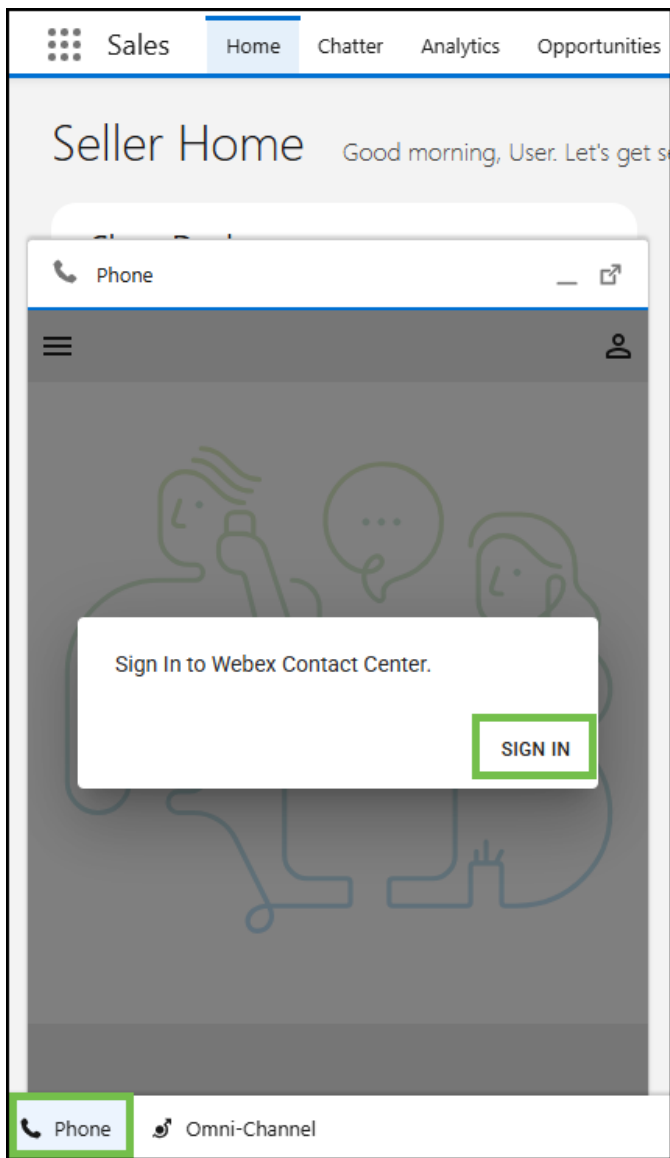
- From the Salesforce Home page, click on the '**App Launcher**' icon (top left).
- Search for *Sales* and click on the '**Sales**' option.

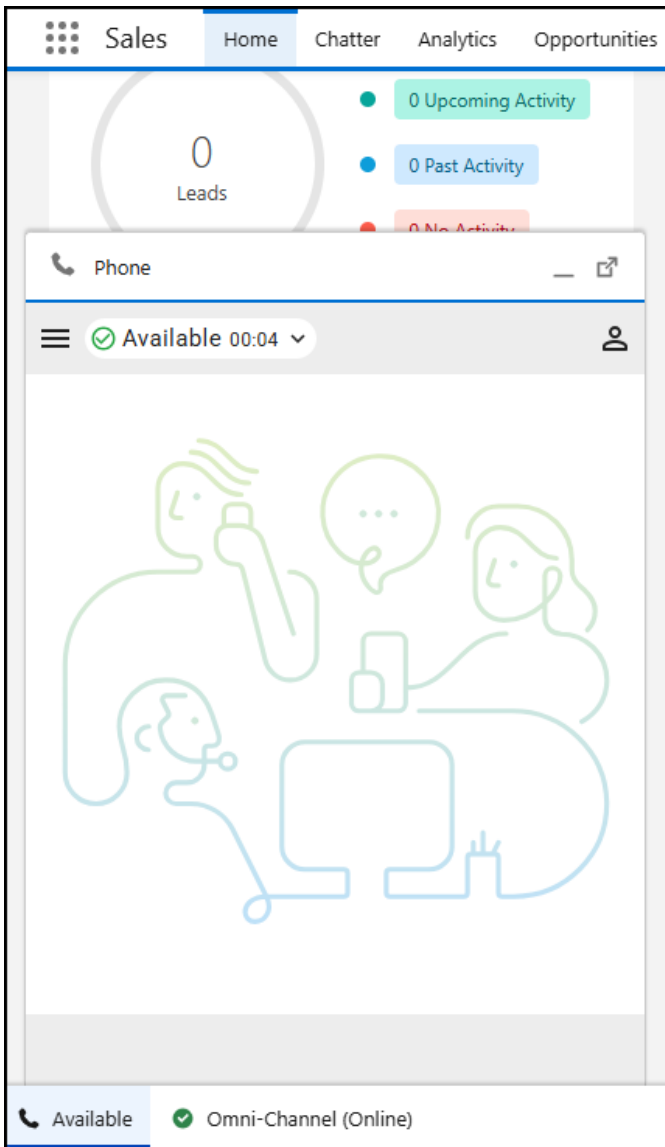


- Open the Webex Contact Center phone widget (bottom left) and login to Webex Contact Center Agent Desktop using the Webex Contact Center user credentials
- First time login into agent desktop could prompt you the OAuth2 Consent as shown in the first screenshot below. Hit **Accept** to continue



- For the phone number, select '**Extension**' and enter the extension or dial number (but not **Desktop** option):
- For the team use the team from your Sandbox.





- Congratulations! You have complete the task.

## 1.4 Integrate New Salesforce Connector with WebRTC

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Please use the following credentials to complete the tasks:

|             |   |
|-------------|---|
| Control Hub | <a href="https://admin.webex.com">https://admin.webex.com</a>             |
| Salesforce  | <a href="https://login.salesforce.com/">https://login.salesforce.com/</a> |

### Note

Legacy (Version-1) Salesforce connector does not need any additional steps to use WebRTC.

### Task Objectives

- Login with WebRTC on New Salesforce Connector (Version-2).
- Troubleshoot and configure the steps needed to enable WebRTC login

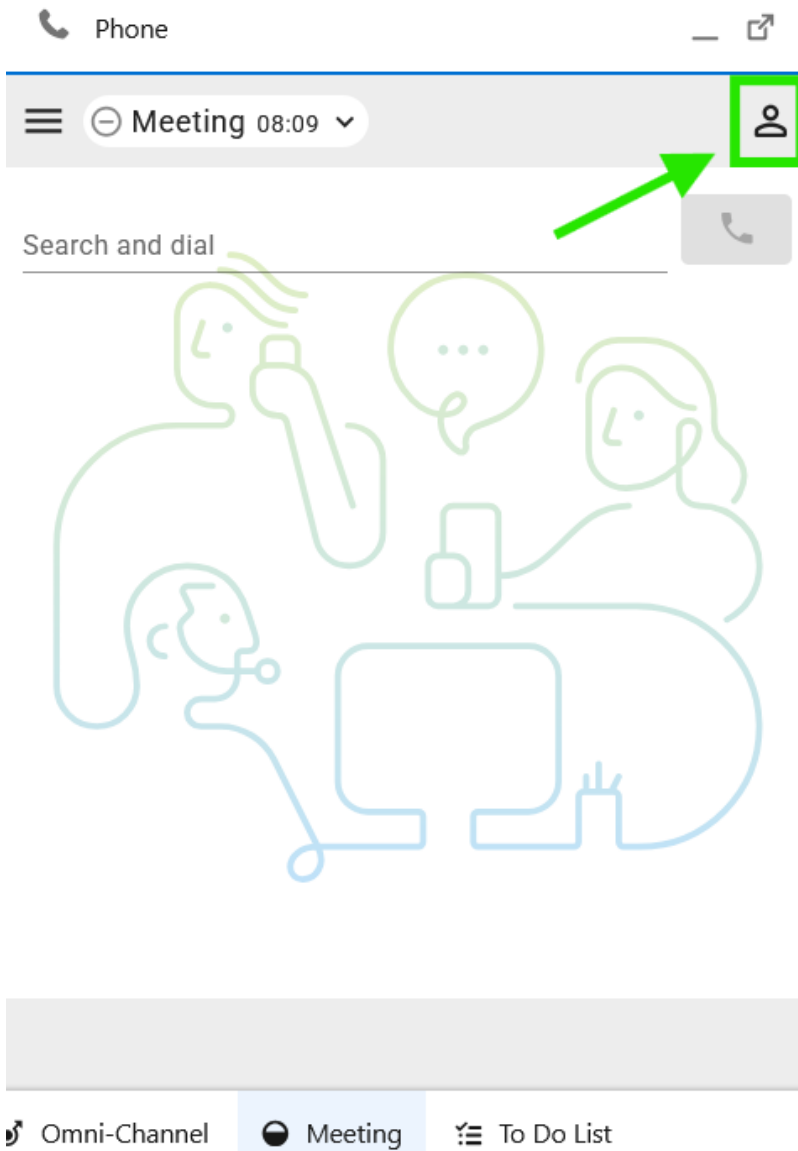
### 1.4.1 1. Using WebRTC Option

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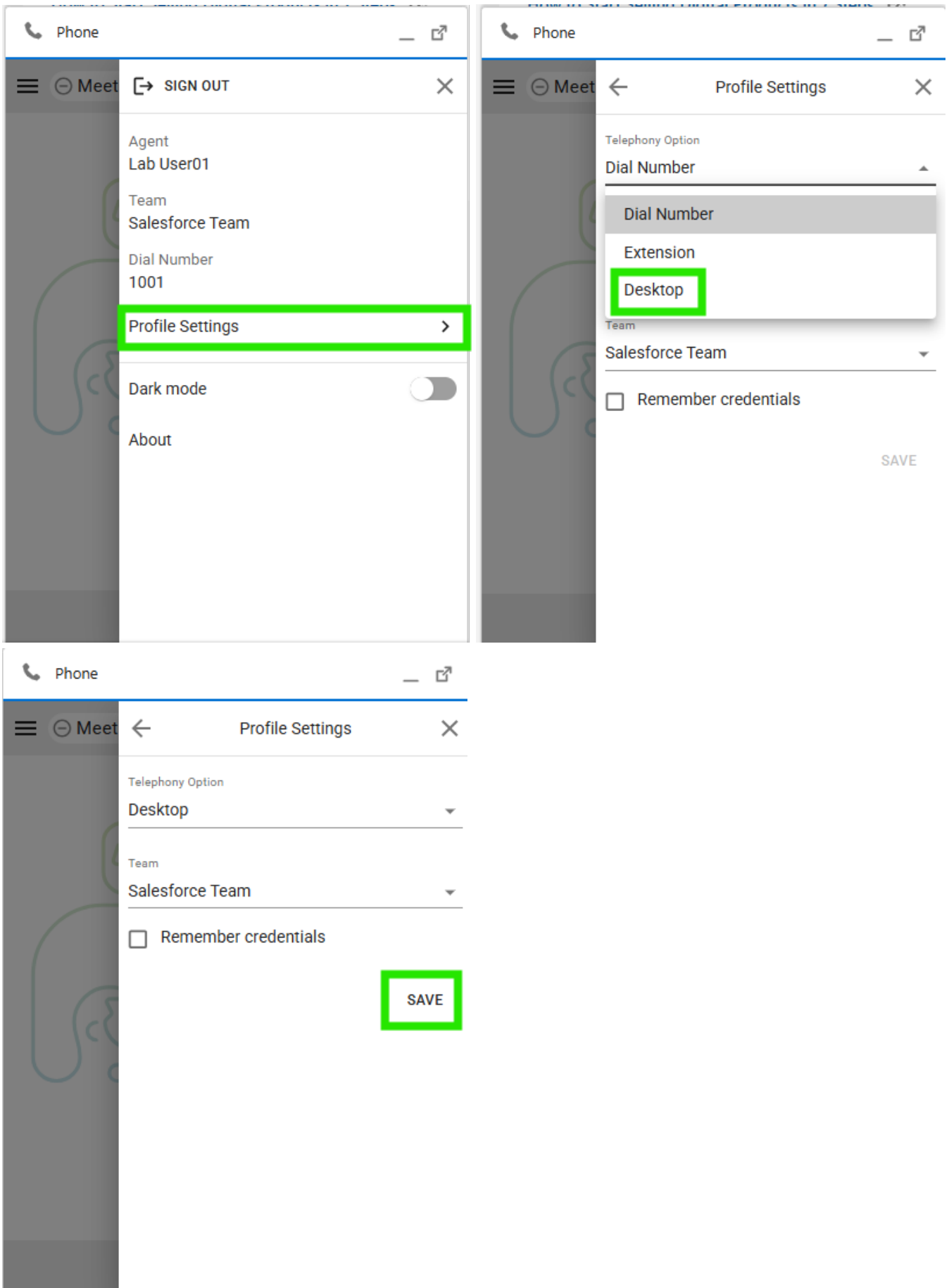
### Attention

Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

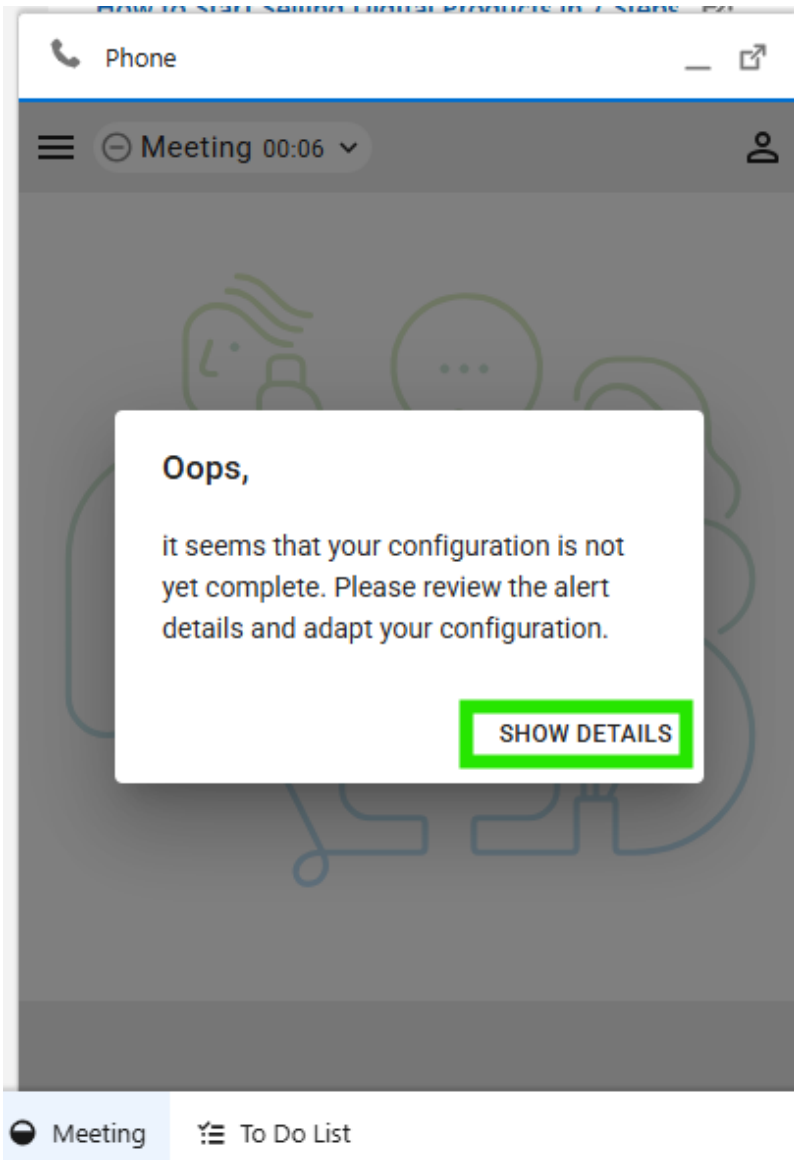
- Navigate to Agent Desktop and select the Avatar on the top right

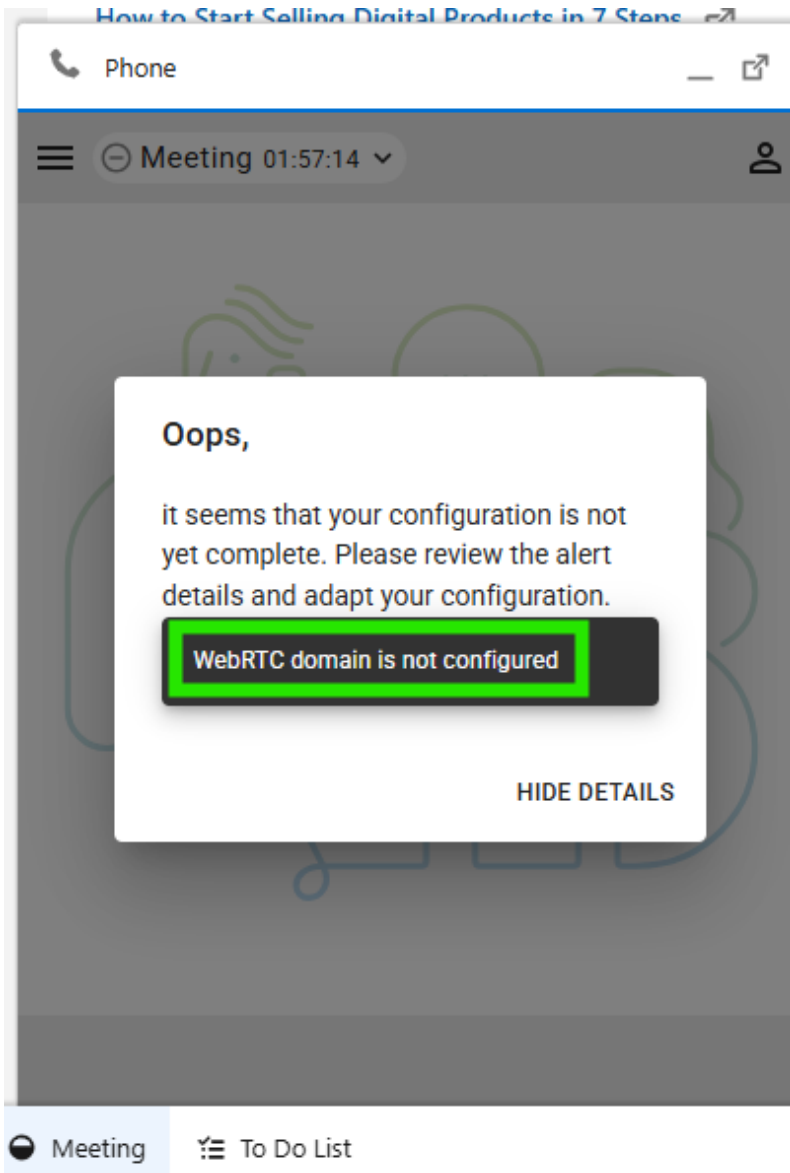


- Navigate to '**Profile Settings > Desktop > Save**' (or type *Call Centers* in the search bar above the left-hand menu).



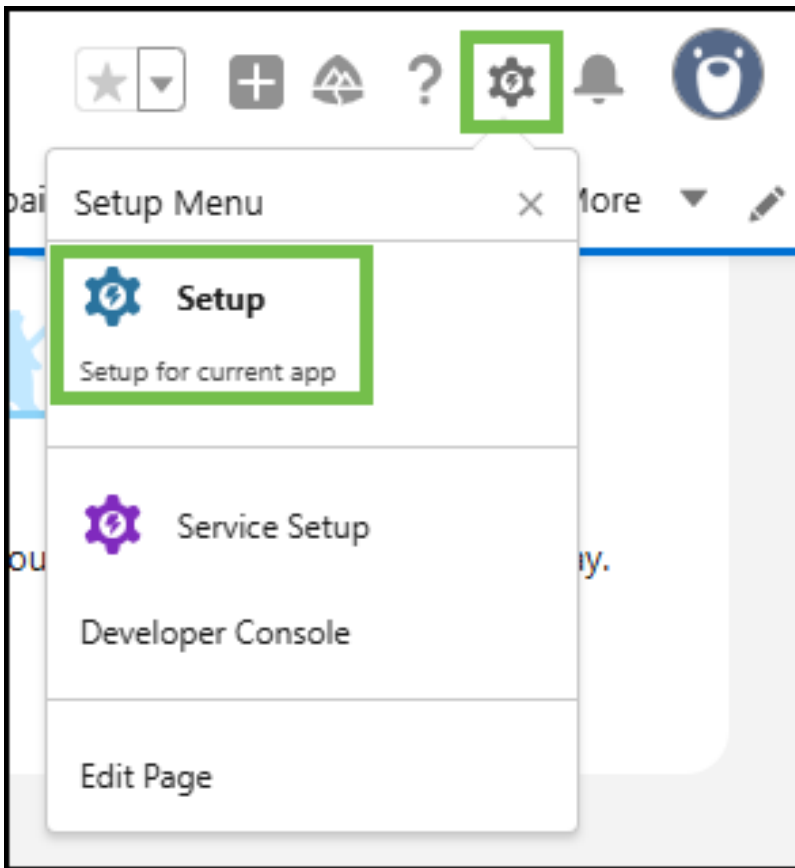
- Once the Save button is hit, the error message pops up "WebRTC domain is not configured"





#### 1.4.2 2. Steps to Correct and Enable WebRTC Login

- In order to mitigate this issue, in Salesforce, navigate to '**Setup**' by clicking the gear icon in the top-right corner and selecting '**Setup**'.



- On the Salesforce portal, navigate to '**Feature Settings > Service > Call Center > Call Centers**' (or type **Call Centers** in the search bar above the left-hand menu).
- Click 'Edit' on the the call center definition file `wxcc call center`

Setup Home Object Manager

call center

Feature Settings

Service

Call Center

Call Centers

Directory Numbers

Softphone Layouts

Didn't find what you're looking for?  
Try using Global Search.


SETUP  
Call Centers

### All Call Centers

A call center corresponds to a single computer-telephony integration (CTI) s

| Action                                   | Name ↑           |
|--|------------------|
| <a href="#">Edit</a> <a href="#">Del</a> | WxCC Call Center |

- Enter 'rtw.prod-us1.rtmsprod.net' in the 'WxCC WebRTC Domain'



SETUP

## Call Centers

Call Center Edit

### WxCC Call Center

[All Call Centers](#) » WxCC Call Center


Call Center Edit

**WxCC Settings**

|                    |   |
|--------------------|---|
| WxCC Region        | <input type="text" value="us1"/>  |
| WxCC WebRTC Domain | <input style="border: 2px solid green;" type="text" value="rtw.prod-us1.rtmsprod.net"/> |

**General Information**

|                 |   |
|-----------------|---|
| Internal Name   | <input type="text" value="wxCcCallCenter"/>               |
| Display Name    | <input type="text" value="WxCC Call Center"/>             |
| Description     | <input type="text" value="Webex Contact Center Sales"/>   |
| CTI Adapter URL | <input type="text" value="https://wxcc-crmconnectors.c"/> |

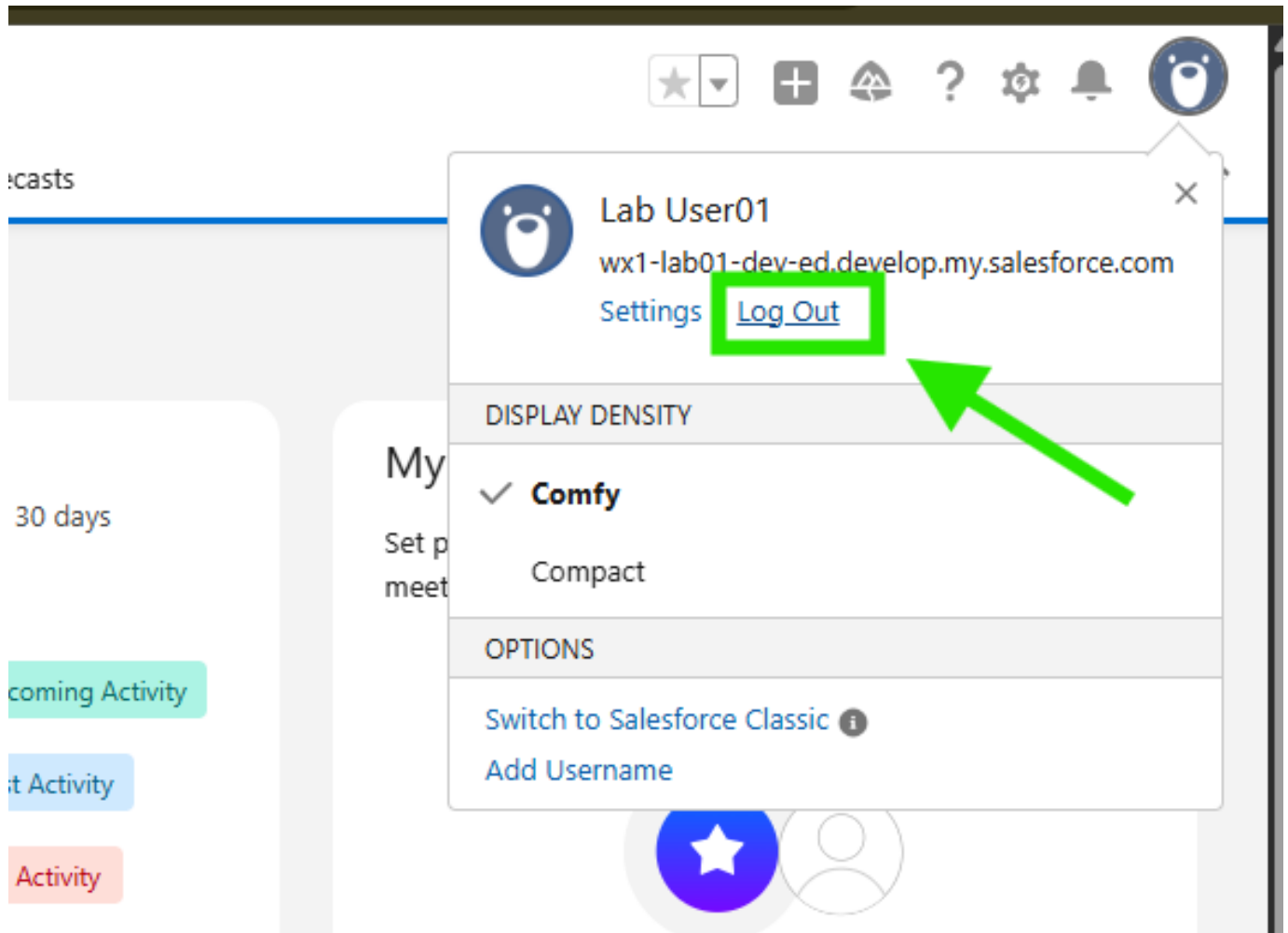
 **Note**

The region defined here should match your Webex Contact Center region. Please refer to the *Call Center configuration customizations* section for the list of the domains for other regions

- Click 'Save'.
- Logout and log back in to salesforce.

- 30/81 -

Copyright © 2025 Cisco

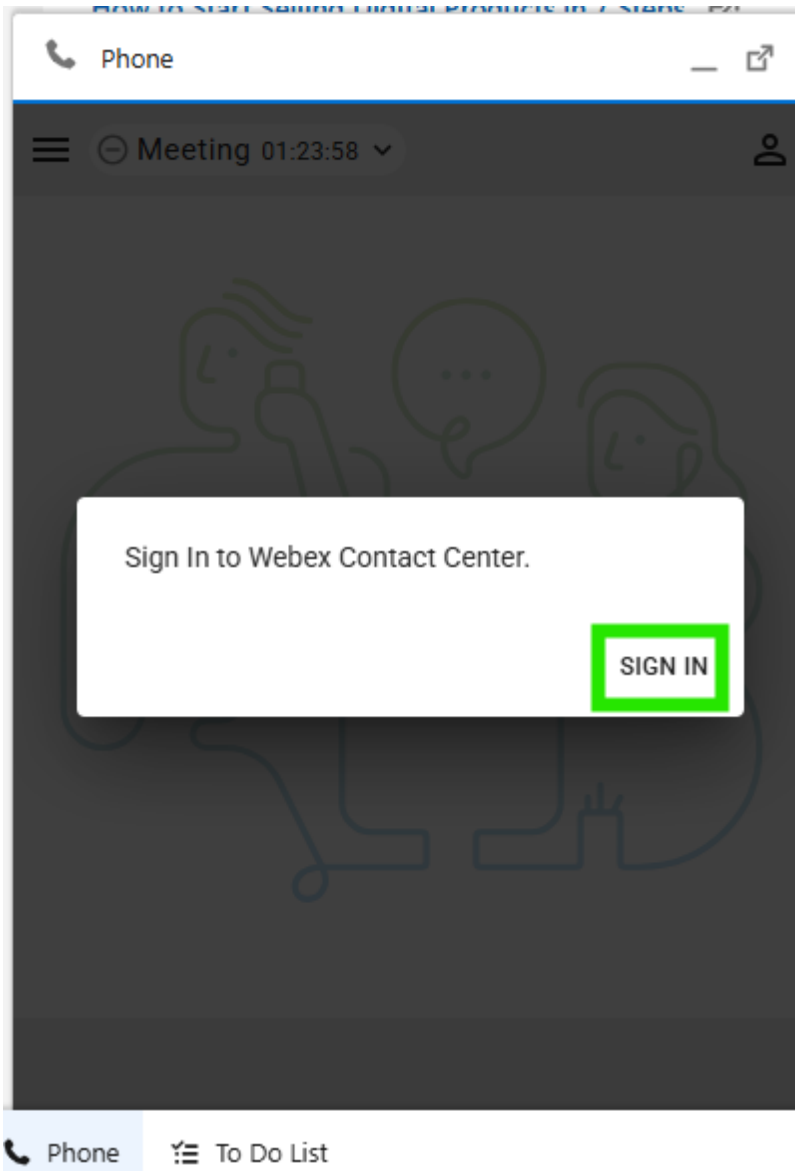


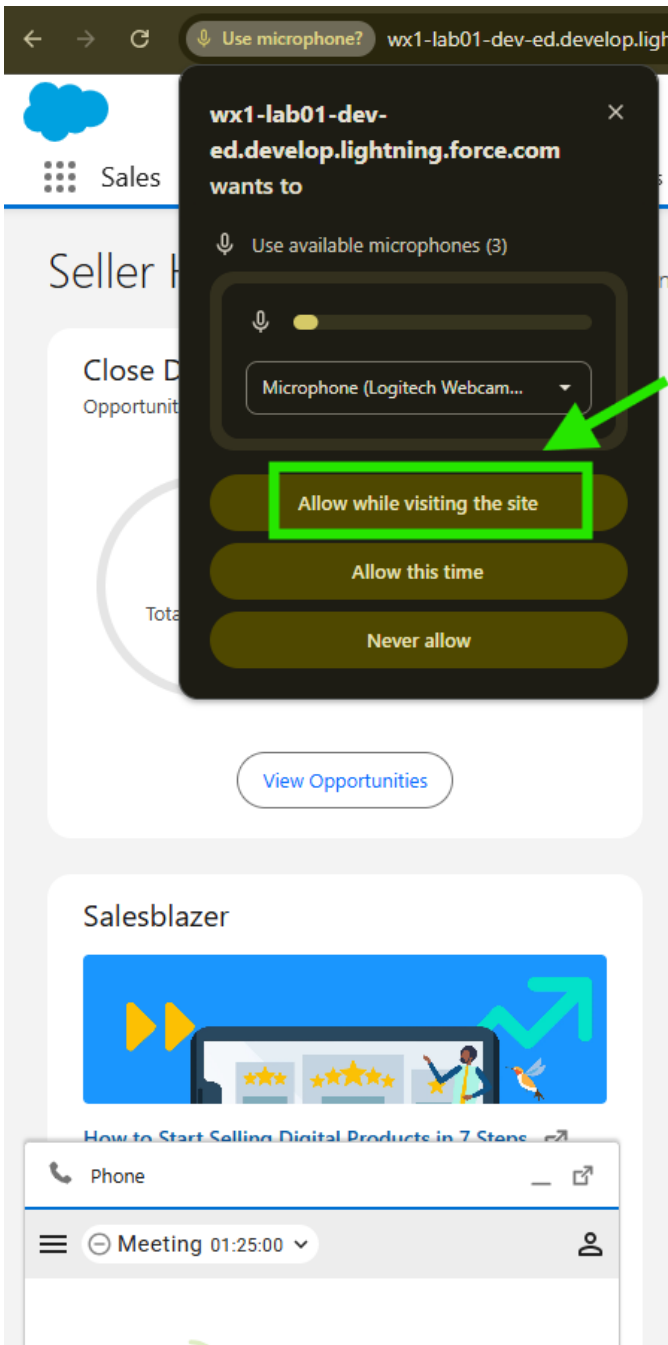
### 1.4.3 3. Testing

#### **Attention**

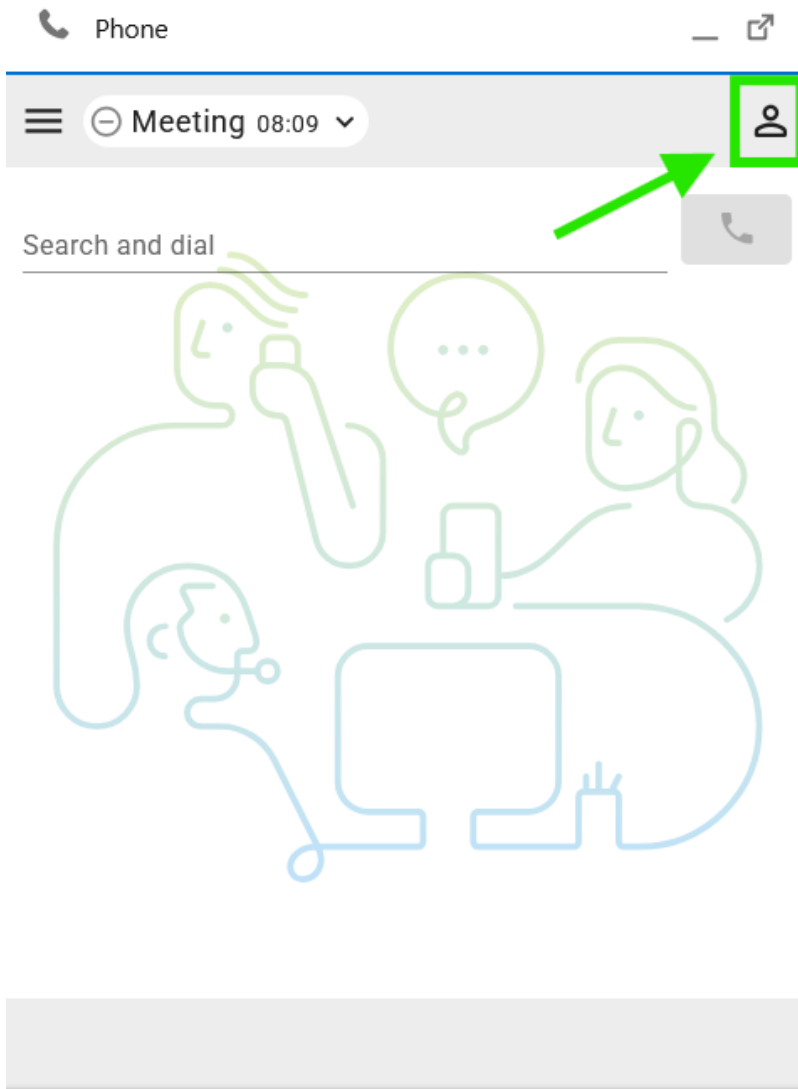
Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

- Open the Webex Contact Center phone widget (bottom left) and login to Webex Contact Center Agent Desktop using the selected Webex Contact Center user credentials (e.g., *labuserID@wx1.wbx.ai*):
- Enable the microphone option as show below if prompted.

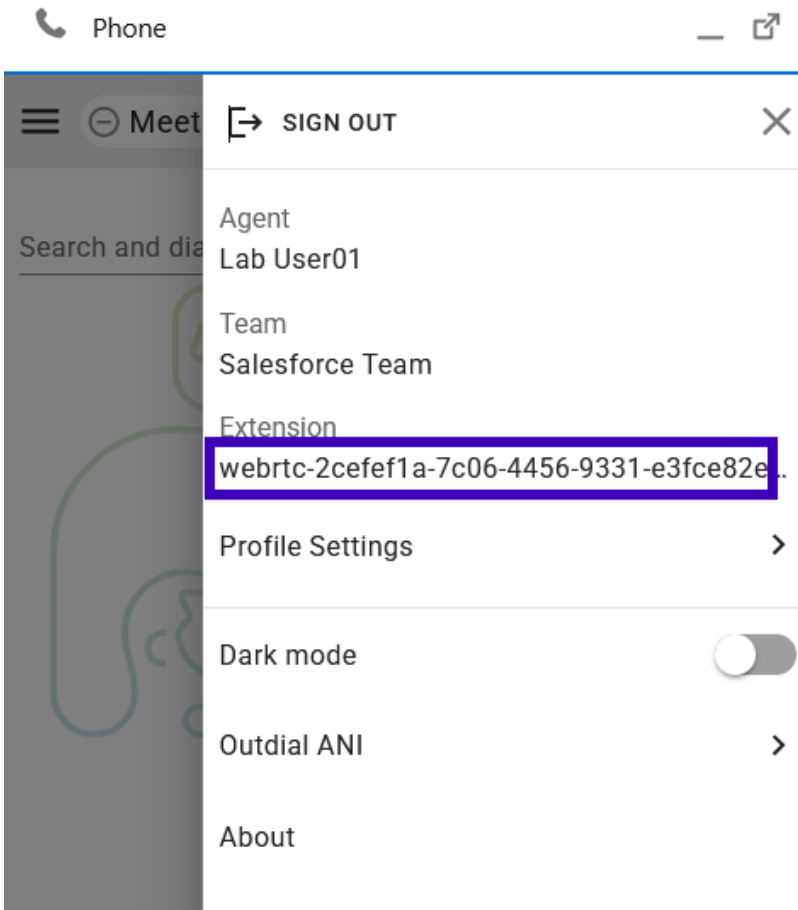




- Navigate to Agent Desktop and select the Avatar on the top right



- Notice the agent is now setup with WebRTC



- Congratulations! You have complete the task.

## 1.5 Presence Synchronization Between Salesforce and Webex Contact Center

Please use the following credentials to complete the tasks:

|             |                               |
|-------------|-------------------------------|
| Control Hub | https://admin.webex.com       |
| Salesforce  | https://login.salesforce.com/ |

### Info

Presence is crucial for agent productivity, especially when handling multiple contacts across different platforms. This task focuses on achieving presence synchronization between Webex Contact Center and Salesforce to ensure agents are utilized efficiently.

### Task Objectives

- Configure Salesforce presence statuses to match Webex Contact Center idle codes.
- Enable presence statuses for the appropriate user profile.
- Set up Omni-Channel state synchronization in Webex Contact Center settings.
- Test state sync between Salesforce Omni-Channel and Webex Contact Center.
- The same steps can be used for both Legacy (Version 1) connector or New (Version-2) connector. The screenshots here are shown for New (Version-2) connector

### 1.5.1 1. Create Presence Statuses

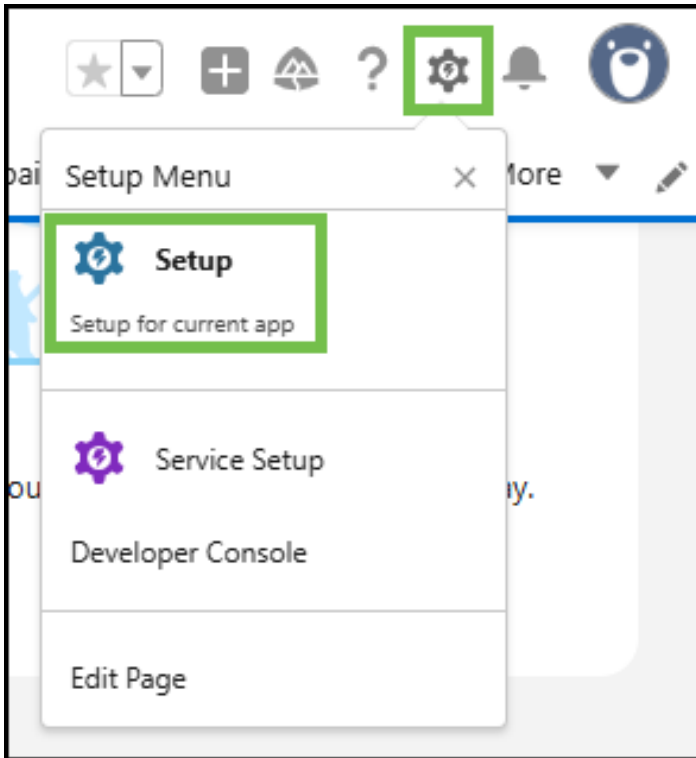
#### Attention

Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

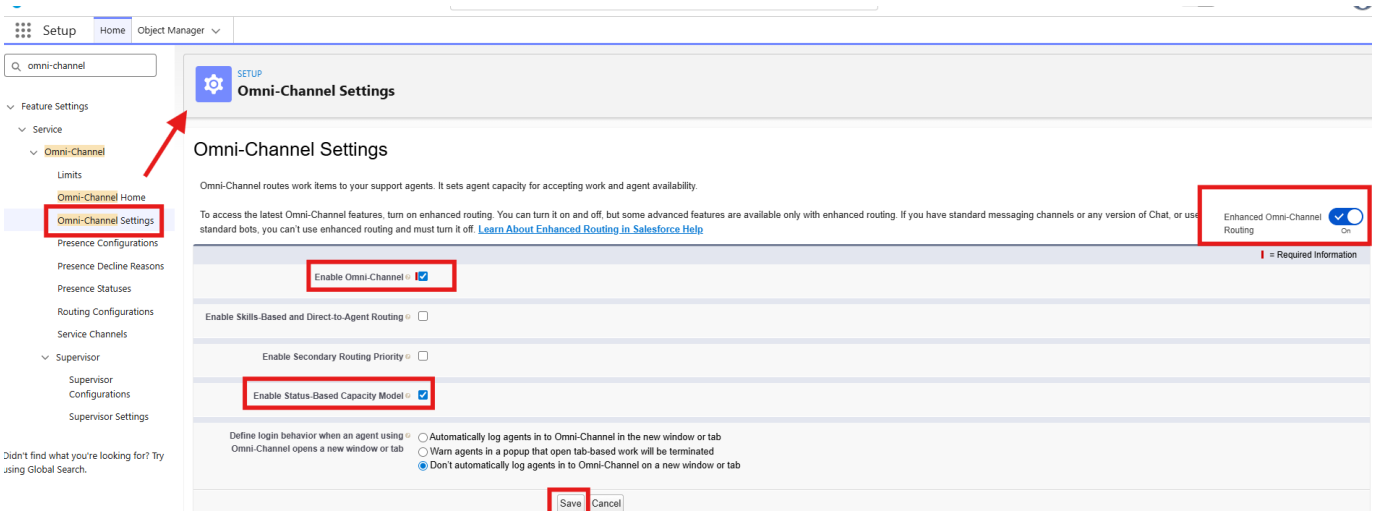
#### Note

For presence synchronization to work between Salesforce and Webex Contact Center, the idle code names in Webex Contact Center must match the presence state names in Salesforce.

- In Salesforce, navigate to '**Setup**' by clicking the gear icon in the top-right corner and selecting '**Setup**'.



- Go to '**Feature Settings > Service > Omni-Channel > Omni-Channel Settings**' (or type *Omni-Channel Settings* in the search bar in the left-hand menu) and enable the below settings highlighted in red and **Save**.



- Go to '**Feature Settings > Service > Omni-Channel > Service Channels**' (or type *Service Channels* in the search bar in the left-hand menu)

Setup Home Object Manager

Service Channels

Feature Settings

Service

Omni-Channel

Service Channels

Didn't find what you're looking for? Try using Global Search.

SETUP Service Channels

## Service Channels

Route work from a Salesforce object, such as cases, chats, leads, or even customers.

View: All Create New View

| Action     | Service Channel Name ↑ |
|------------|------------------------|
| Edit   Del | Messaging              |
| Edit   Del | Phone                  |

- Edit Service Channel Name Phone and update the **Capacity Settings** to **Status Based** and hit **Save**

---

### Basic Information

|   |                                     |
|---|-------------------------------------|
| Service Channel Name                                  | <input type="text" value="Phone"/>  |
| Developer Name  | sfdc_phone                          |
| Salesforce Object                                     | Voice Call                          |
| Custom Console Footer Component                       |                                     |
| Minimize Omni-Channel component when work is accepted | <input checked="" type="checkbox"/> |
| Automatically accept work requests                    | <input type="checkbox"/>            |
| Is Interruptible                                      | <input type="checkbox"/>            |

---

### Audio Settings

|                                 |                          |
|---------------------------------|--------------------------|
| Override agents' audio settings | <input type="checkbox"/> |
|---------------------------------|--------------------------|

---

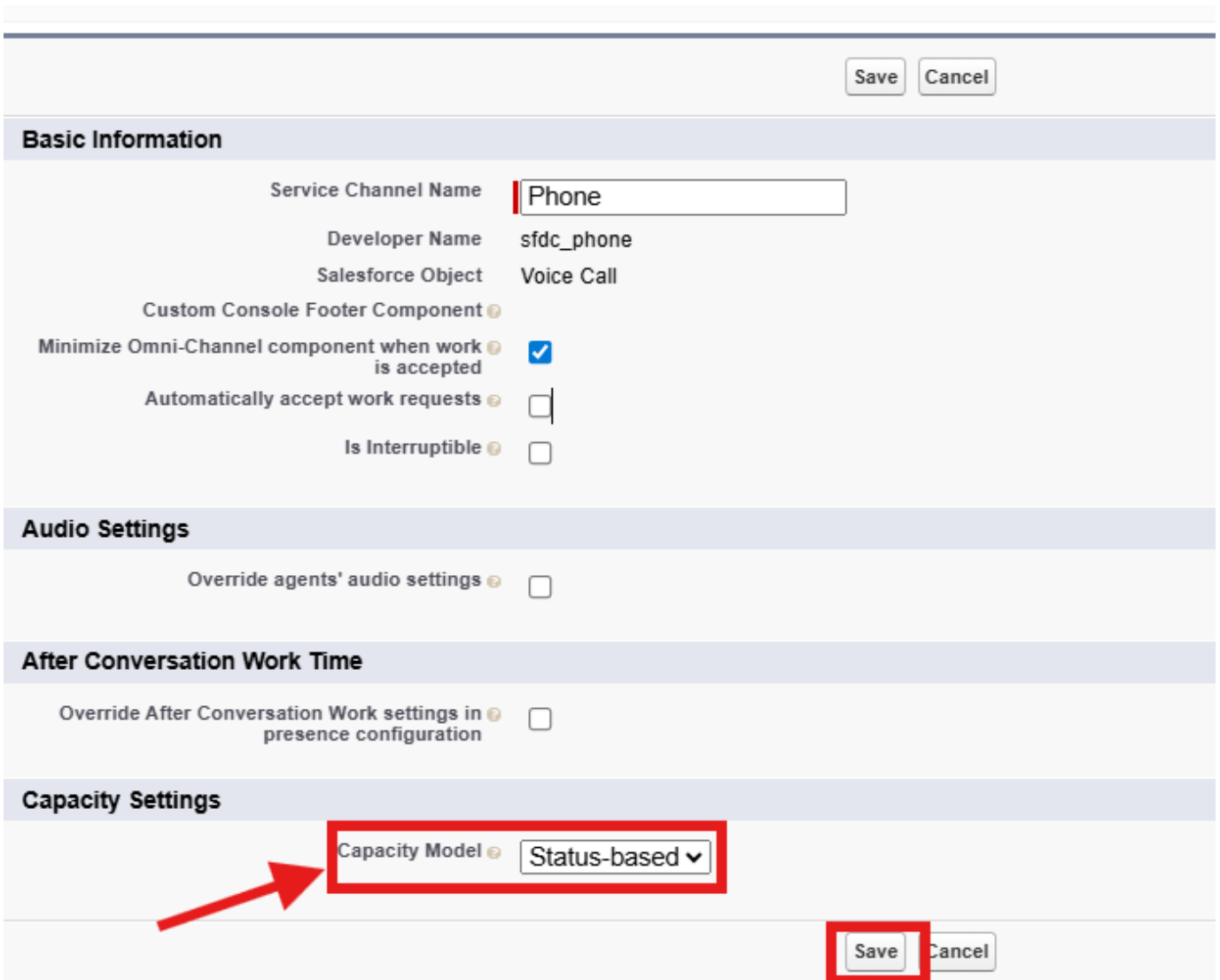
### After Conversation Work Time

|   |                          |
|---|--------------------------|
| Override After Conversation Work settings in presence configuration | <input type="checkbox"/> |
|---|--------------------------|

---

### Capacity Settings

|                |   |
|----------------|---|
| Capacity Model | <input type="text" value="Status-based"/> |
|----------------|---|



- Go to '**Feature Settings > Service > Omni-Channel > Presence Statuses**' (or type *Presence Statuses* in the search bar in the left-hand menu).

The screenshot shows the Cisco Service Center Setup interface for managing Presence Statuses. The left sidebar contains a search bar with the text 'Presence Statuses' and a navigation menu with 'Feature Settings', 'Service', and 'Omni-Channel' expanded to show 'Presence Statuses'. The main content area has a 'SETUP Presence Statuses' header, a description, a 'View: All' dropdown, and a 'New' button highlighted in a green box. Below is a table with columns 'Action', 'Status Name', and 'Developer Name', showing 'Available' for each.

- Create two new **Presence Statuses**:
- Click 'New'.
- Provide the name **wxccbusy** under 'Status Name' and select 'Busy' under 'Status Options'.
- Click 'Save' and select 'Back to List: Service Presence Statuses'
- Create another **Presence Status** with the same options but use **sfbusy** under 'Status Name'.

# Presence Statuses

Let agents indicate when they're online and available to receive work items from a spe

Save Cancel

## Basic Information

Status Name

Developer Name

### ▼ Status Options

Choose whether agents are online or busy when they use this status. Online sta  
indicate that they're unavailable to receive work items.

Online

Busy

Save Cancel

## Presence Statuses

Let agents indicate when they're online and available to receive work items from

Save Cancel

### Basic Information

Status Name

Developer Name

### ▼ Status Options

Choose whether agents are online or busy when they use this status. Online indicate that they're unavailable to receive work items.

Online

Busy

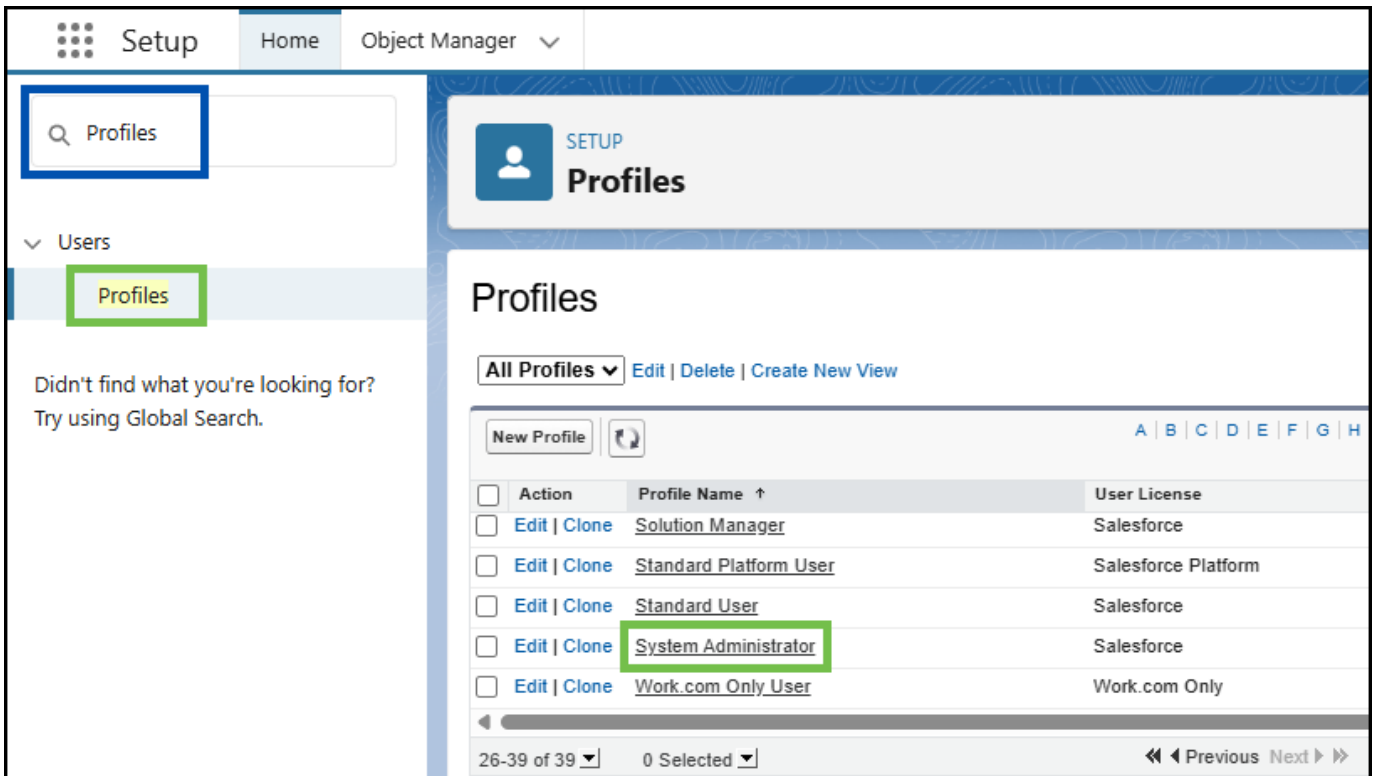
Save Cancel

### 1.5.2.2. Enable Presence Statuses for the User Profile

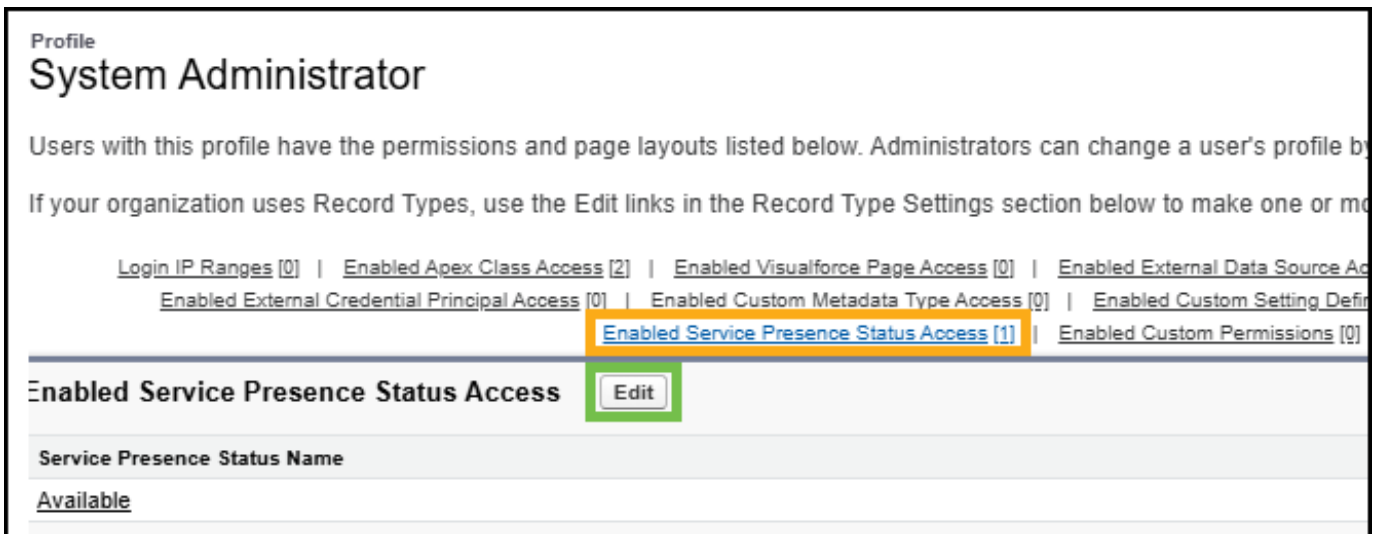
- Navigate to '**Users > Profiles**' (or type *Profiles* in the search bar in the left-hand menu).
- Locate the '**System Administrator**' profile (select **next** at the bottom to go to the next page) and click on it (do not click '**Edit**').

#### Note

For the purpose of this exercise, the '**System Administrator**' profile is used. Under normal circumstances, any other profile may be used by users.



- In the next window, hover over '**Enabled Service Presence Status Access**' and click '**Edit**'.



- Move **Available**, **sfbusy** and **wxcbusy** from '**Available Service Presence Statuses**' to '**Enabled Service Presence Statuses**'.

## Enable Service Presence Status Access

Save Cancel

**Available Service Presence Statuses**

--None-- ▲

**Enabled Service Presence Statuses**

Available ▲

sfbusy

wxccbusy

Add ▶

Remove ◀

- Click 'Save'.

### 1.5.3.3. Configure Omni-Channel State Sync in Call Center Settings

- Navigate to '**Feature Settings > Service > Call Center > Call Centers**' (or type *Call Centers* in the search bar in the left-hand menu).
- Click '**Edit**' for '**WxCC Call Center**'.

The screenshot shows the Salesforce Setup interface for Call Centers. The left sidebar has a search bar with 'Call Centers' entered and a navigation menu with 'Call Centers' highlighted. The main content area shows the 'All Call Centers' page with a table listing one call center: 'WxCC Call Center'.

| Action                                   | Name ↑                           | Version | Created Date        |
|--|----------------------------------|---------|---------------------|
| <a href="#">Edit</a> <a href="#">Del</a> | <a href="#">WxCC Call Center</a> |         | 5/11/2025, 11:20 AM |

- Under '**Omni-Channel State Sync Configuration**', do the following:
- Set '**Enable Omni-Channel Sync**' to **true** (type it in manually).
- For '**Omni-Channel Not Ready Reason**', type **wxccbusy**.
- For '**WxCC Idle Reason Code**', type **sfbusy**.

#### Note

'**Omni-Channel Not Ready Reason**' is the name of the Salesforce Omni-Channel "Busy" reason status used when the agent receives an inbound call in Webex Contact Center. '**WxCC Idle Reason Code**' is the name of the Webex Contact Center Idle code used when the agent receives an inbound chat in Salesforce.

**SETUP**  
**Call Centers**

### Omni-Channel State Sync Configuration

|                               |                                       |
|-------------------------------|---------------------------------------|
| Enable Omni-Channel Sync      | <input type="text" value="true"/>     |
| Omni-Channel Not Ready Reason | <input type="text" value="wxccbusy"/> |
| WxCC Idle Reason Code         | <input type="text" value="sfbusy"/>   |

### Widget Settings

|                            |                                    |
|----------------------------|------------------------------------|
| Send Browser Notifications | <input type="text" value="false"/> |
|----------------------------|------------------------------------|

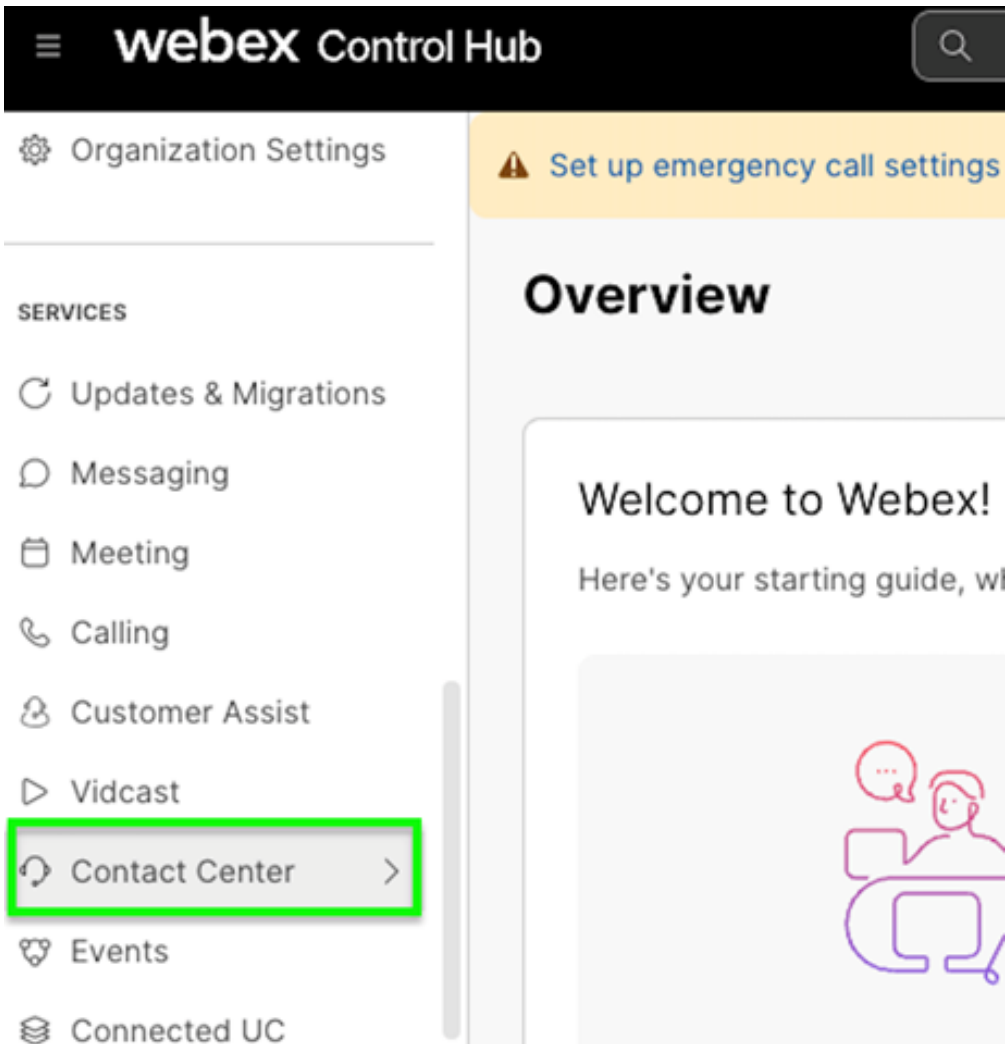
- Click 'Save'.

**Note**

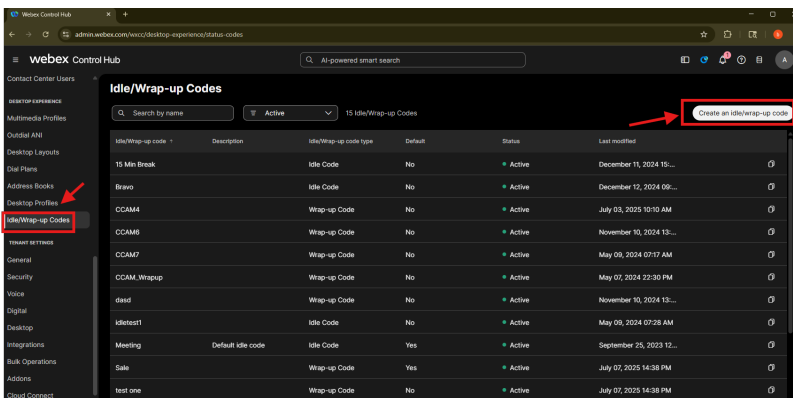
For the purpose of this lab, the idle code **sfbusy** has already been created on the Webex Contact Center side.

#### 1.5.4 4. Webex Contact Center Configuration

- Log in to the <https://admin.webex.com> using the credentials provided at the top of this page.
- Click on Contact Center in the left-hand side navigation pane of the Webex Control Hub.



- After logging in, navigate to the 'Idle/Wrap-up Codes' menu on the left-hand side and select Create an **Idle/Wrap-up Codes**



- Create an idle code **sfbusy** and select **Create**

General

Name \*

Description

Make it default

Code type \*

**Note**

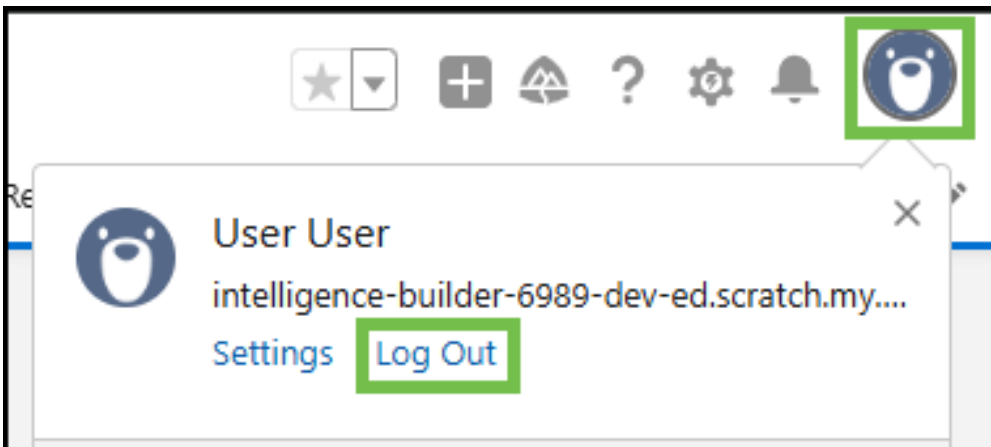
Please make sure that the idle code is added to the desktop profile under '**Idle/Wrap-up Codes**'

## 1.5.5 5. Testing Omni Sync Presence

**Attention**

Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

- Refresh Salesforce by logging out and logging back in (**make sure to close any other Salesforce tabs**).

**Reminder**

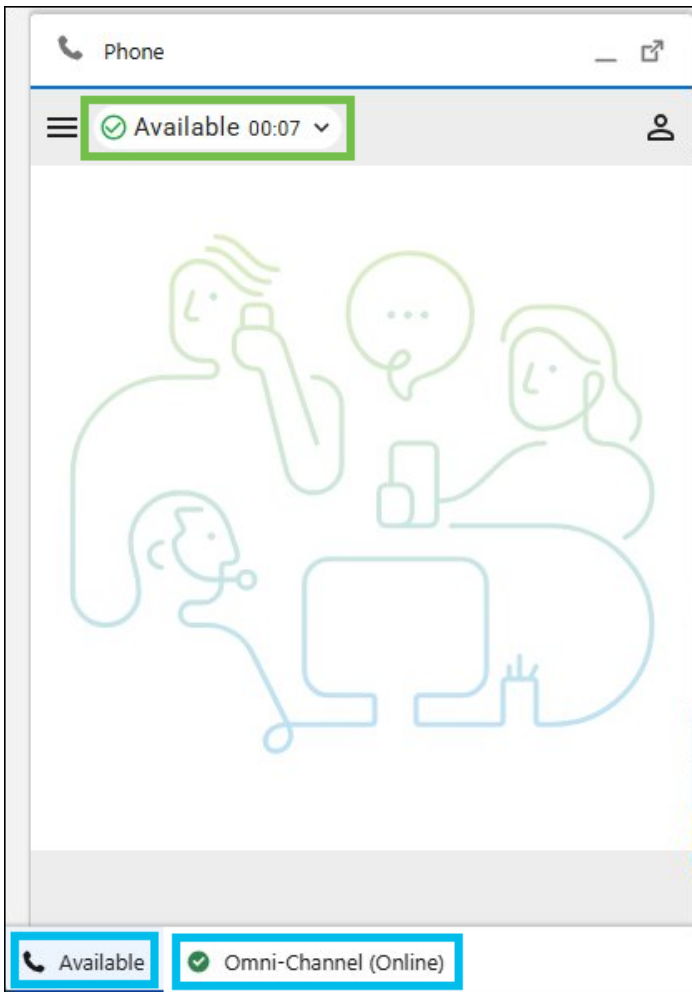
Please select the '**Desktop**' option for the phone number.

- Open the Webex Contact Center widget (**Phone**) and change the states (e.g., *sfbusy*, *available*) — the Salesforce **Omni-Channel** widget status should follow accordingly.
- Test changing the state from the Salesforce **Omni-Channel** widget — the Webex Contact Center widget should follow as well.

**Note**

'**Omni-Channel Not Ready Reason**' is the name of the Salesforce Omni-Channel "Busy" reason status used when the agent receives an inbound call in Webex Contact Center. Therefore, the **wxcdbusy** state on the Omni-Channel widget will only appear when an agent is actively engaged in a Webex Contact Center call (this will be tested in the next tasks)



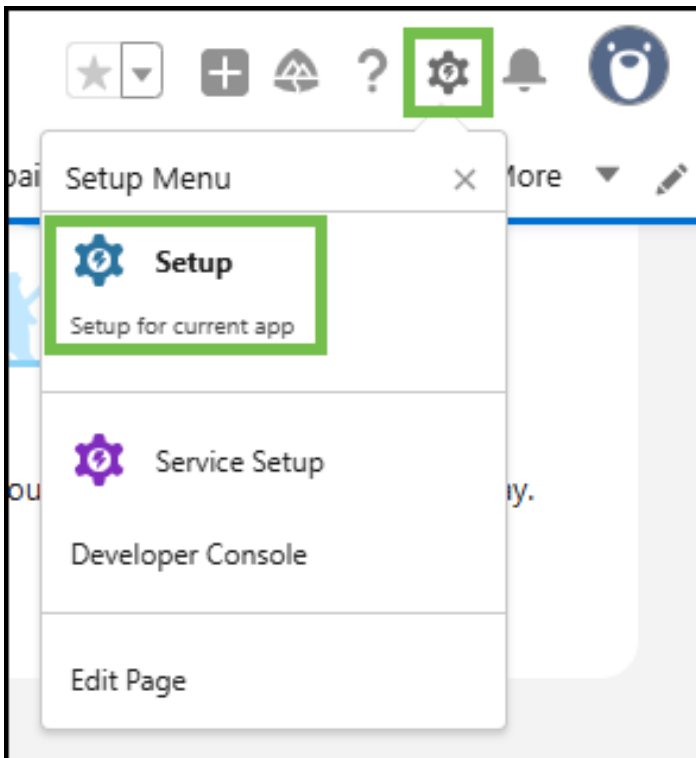


- Congratulations! You have completed the task.

#### 1.5.6 6. Troubleshooting Failed Sync Due to Mismatched Idle Codes

---

- In Salesforce, navigate to '**Setup**' by clicking the gear icon in the top-right corner and selecting '**Setup**'.



- Go to '**Feature Settings > Service > Omni-Channel > Presence Statuses**' (or type *Presence Statuses* in the search bar in the left-hand menu).
- Select '**Edit**' the Presence Status **sfbusy** created before

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A 'Quick Find' search bar is on the left. The main content area is titled 'Presence Statuses' and includes a sub-header 'Let agents indicate when they're online and available to receive work items from'. Below this is a 'View: All' dropdown and a 'Create New View' link. A table lists three status names: 'Available', 'sfbusy', and 'wxccbusy'. The 'Edit' link for 'sfbusy' is highlighted with a green box, and a green arrow points to it.

| Action               | Status Name ↑             |
|----------------------|---------------------------|
| <a href="#">Edit</a> | <a href="#">Available</a> |
| <a href="#">Edit</a> | <a href="#">sfbusy</a>    |
| <a href="#">Edit</a> | <a href="#">wxccbusy</a>  |

- Update **sfbusy** to **Sfbusy** (capitalizing the letter S) and click 'Save'.

# Presence Statuses

Let agents indicate when they're online and available to receive work items from a specific service channel,

Save Cancel

**Basic Information**

Status Name →

Developer Name →

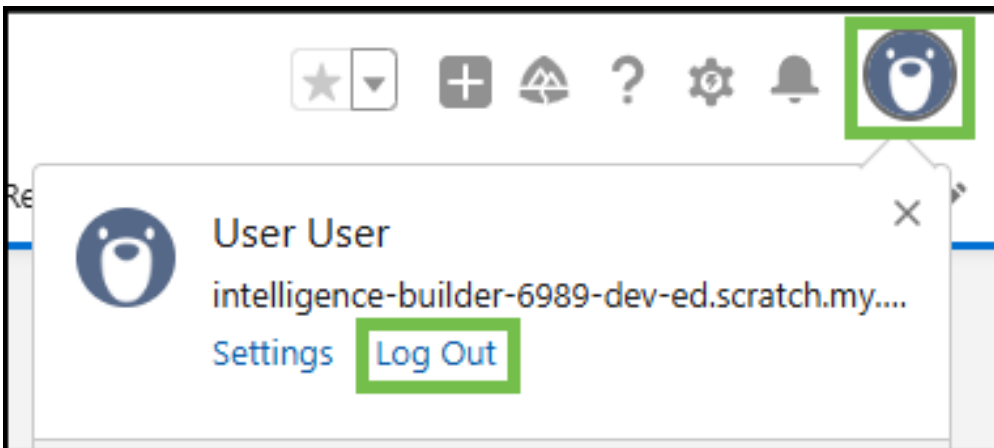
**▼ Status Options**

Choose whether agents are online or busy when they use this status. Online statuses let agents receive work items.

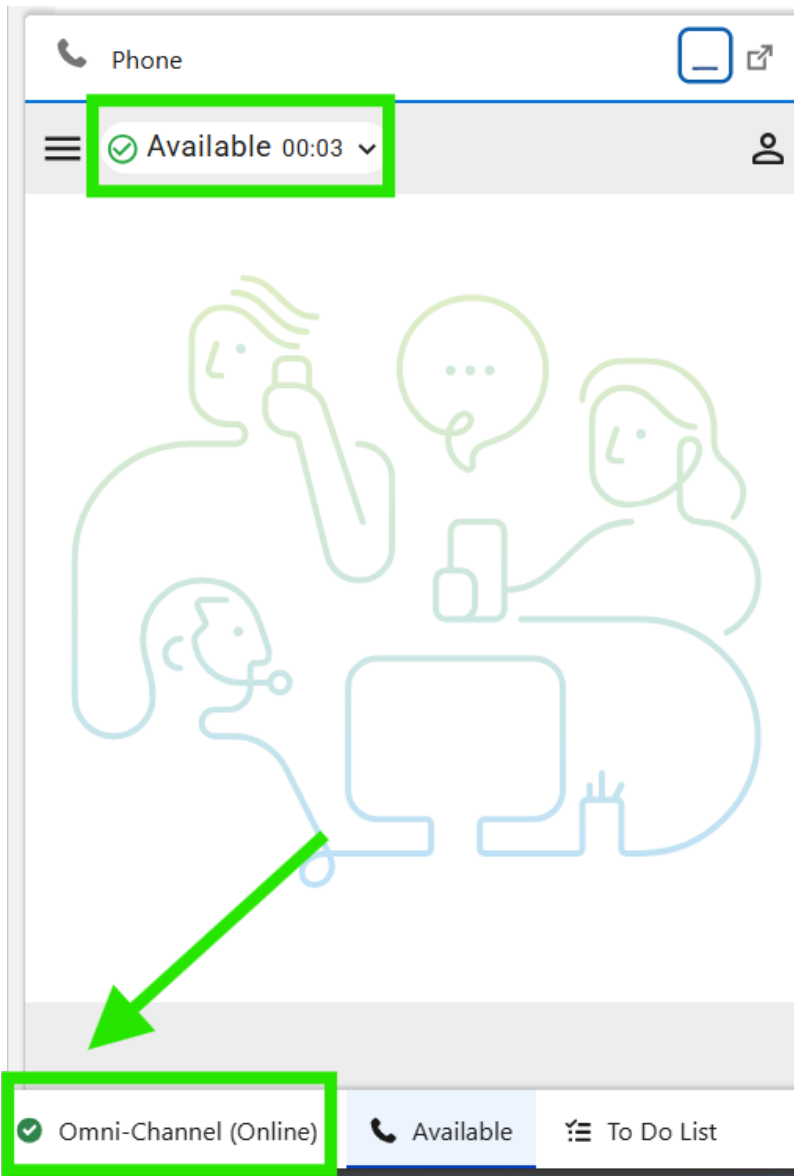
Online  
 **Busy**

Save Cancel

- Refresh Salesforce by logging out and logging back in (**make sure to close any other Salesforce tabs**).



- Open the Webex Contact Center widget (**Phone**) and change the states to '**Available**' — the Salesforce **Omni-Channel** widget status will be changed to '**Available**'



- Test changing the state from the Salesforce **Omni-Channel** widget to **Sfbusy** and notice that the Webex Contact Center widget still shows as '**Available**'



**Reason**

When presence status on **sfbusy** is updated to **Sfbusy**, presence sync because idle code on WxCC is **sfbusy**. Omni-channel codes created on Salesforce and in Webex Contact Center needs to match in spelling and in case. Please refer to the *Omni-Channel State Sync Configuration* section for the external documentation

- Congratulations! You have completed the task.

## 1.6 Data Lookup Using CAD Variables

---

Please use the following credentials to complete the tasks:

|             |   |
|-------------|---|
| Control Hub | <a href="https://admin.webex.com">https://admin.webex.com</a>             |
| Salesforce  | <a href="https://login.salesforce.com/">https://login.salesforce.com/</a> |

### Info

Utilizing CAD (Call-Associated Data) variables passed from Webex Contact Center enables agents to streamline their workflows and operate more efficiently when addressing customer interactions and requests. These variables provide agents with critical information, such as customer details or interaction context, directly within their interface. By having instant access to this data, agents can reduce the need for manual lookups, save time, and deliver a more personalized and effective customer experience. This not only improves agent productivity but also enhances overall customer satisfaction.

### Task Objectives

- Configure Call Center in Salesforce for advanced screen pop functionality.
- Customize and publish a Webex Contact Center flow with Salesforce integration.
- Test the integration by triggering a Salesforce contact creation via a phone call.

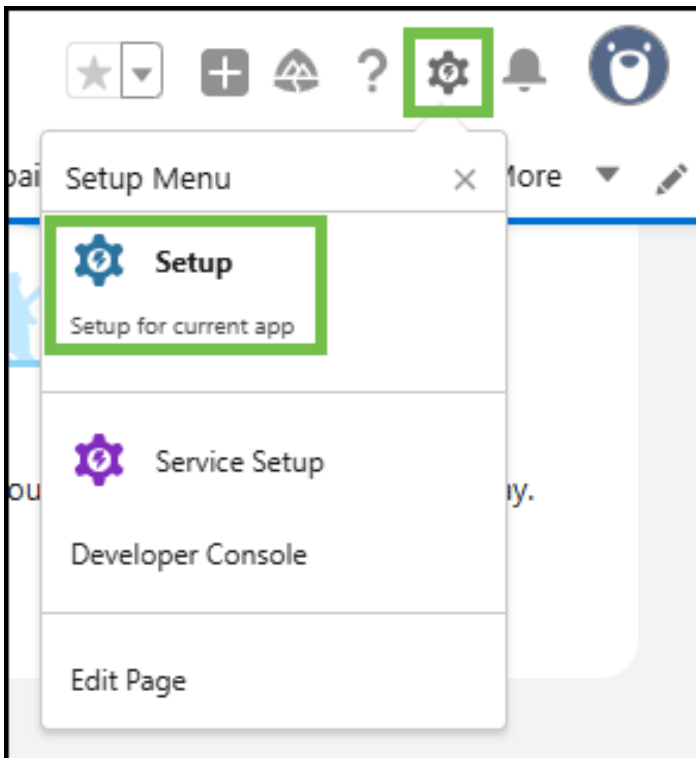
### 1.6.1.1. Salesforce Configuration

---

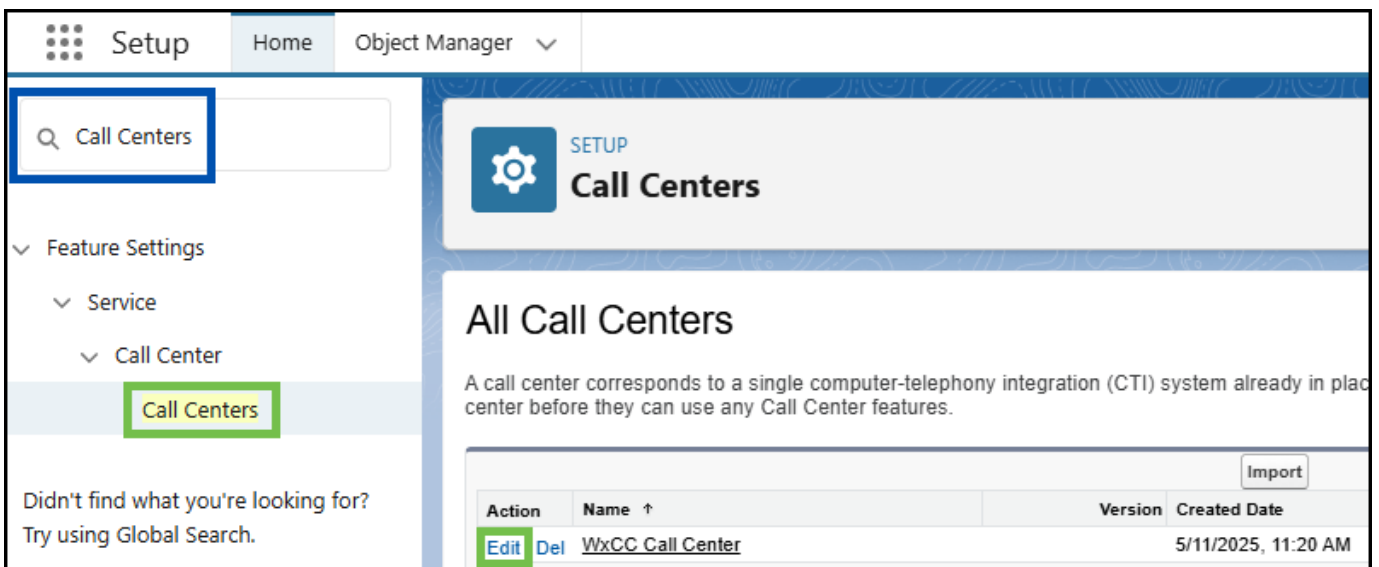
#### Attention

Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

- Navigate to '**Setup**' by clicking the gear icon in the top-right corner and selecting '**Setup**'



- Go to '**Feature Settings > Service > Call Center > Call Centers**' (or type *Call Centers* in the search bar in the left-hand menu).
- Click '**Edit**' for '**WxCC Call Center**'.



- Under '**Advanced Screen Pop Search Configuration**', change '**Advanced Screen Pop Enabled**' to **true** (type it in manually).
- For '**CAD Variable Name**', use *ani*.
- Under '**Screen Pop Settings for No Record Match**', populate '**Object Field Mappings**' as follows:

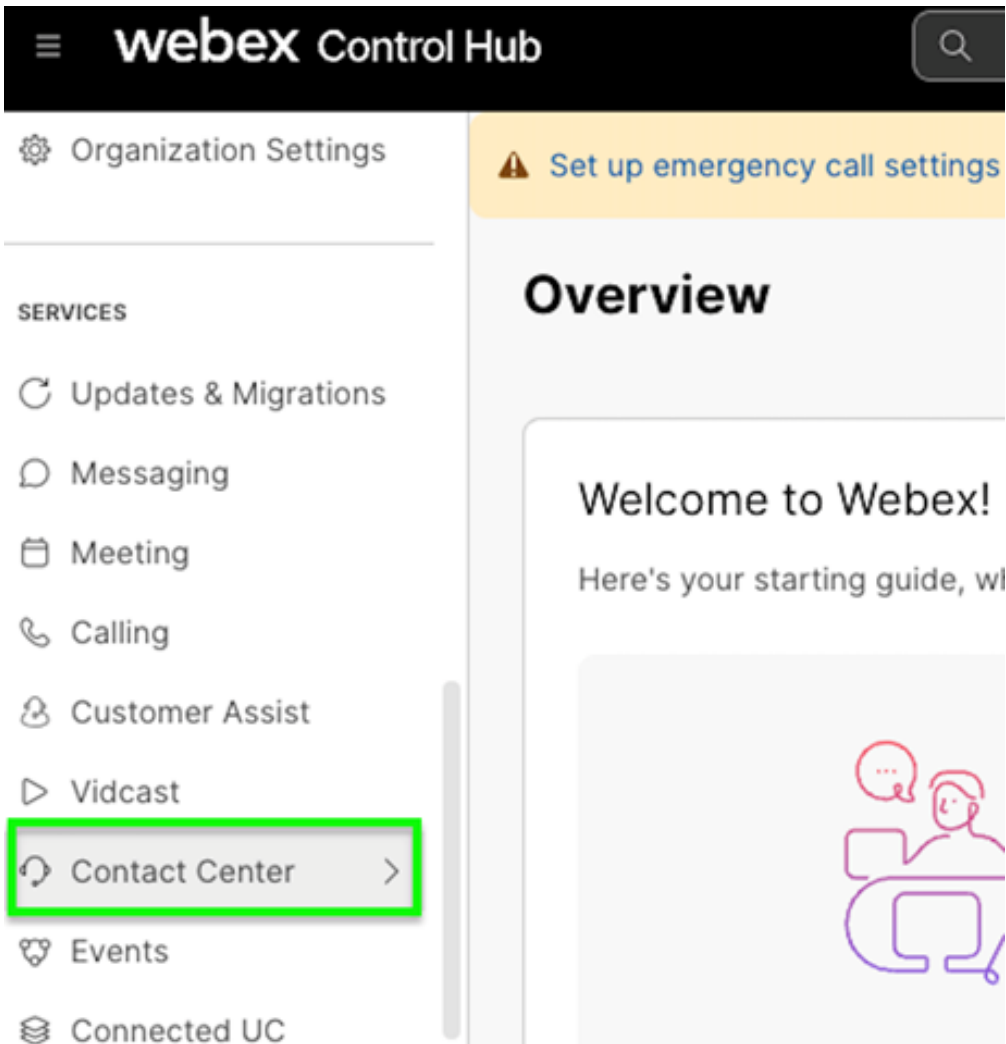
Phone={ani}

| Advanced Screen Pop Search Configuration                                  |  |
|---|--|
| Advanced Screen Pop Enabled   | <input type="text" value="true"/>        |
| CAD Variable Name   | <input type="text" value="ani"/>         |
| Remove ANI Prefix Strings   | <input type="text"/>                     |
| Case Management   |  |
| Auto Case Creation For Inbound Calls                                      | <input type="text" value="false"/>       |
| Auto Case Creation For Outbound calls                                     | <input type="text" value="false"/>       |
| Open Case Object In Edit Mode   | <input type="text" value="false"/>       |
| Object Field Mappings   | <input type="text"/>                     |
| Screen Pop Settings For No Record Match                                   |  |
| Object Field Mappings   | <input type="text" value="Phone={ani}"/> |
| Omni-Channel State Sync Configuration                                     |  |
| Enable Omni-Channel Sync  | <input type="text" value="true"/>        |
| Omni-Channel Not Ready Reason   | <input type="text" value="wxccbusy"/>    |
| WxCC Idle Reason Code   | <input type="text" value="sfbusy"/>      |
| Widget Settings   |  |
| Send Browser Notifications  | <input type="text" value="false"/>       |
| <input type="button" value="Save"/> <input type="button" value="Cancel"/> |  |

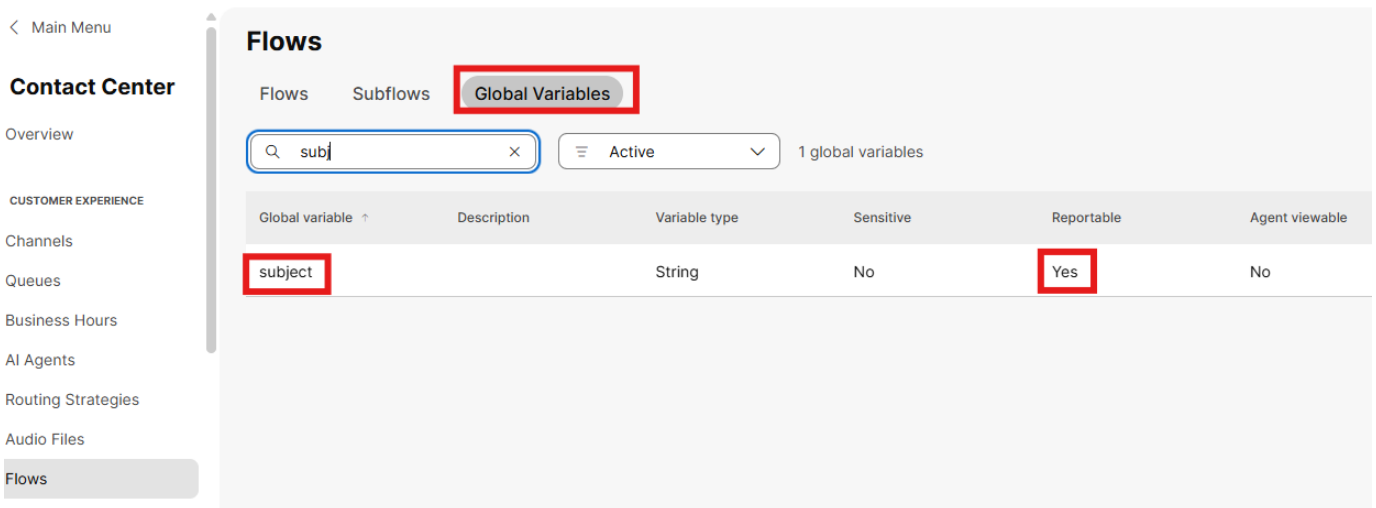
- Click 'Save'.

## 1.6.2.2. Webex Contact Center Configuration

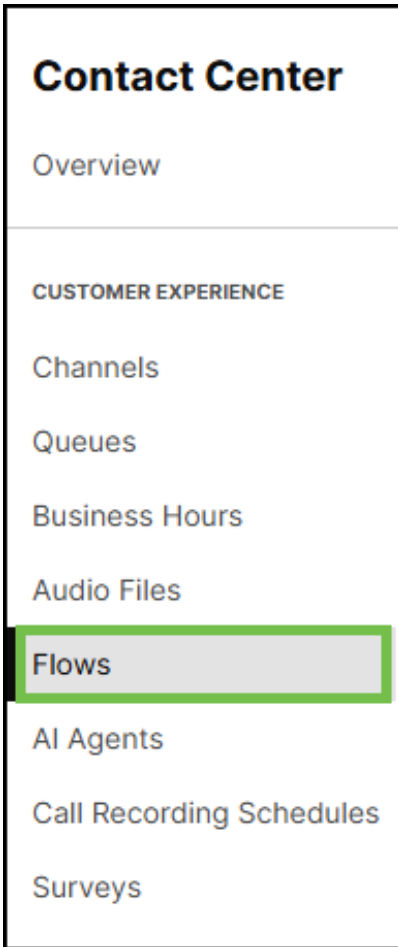
- Log in to the <https://admin.webex.com> using the credentials provided at the top of this page.
- Click on Contact Center in the left-hand side navigation pane of the Webex Control Hub.



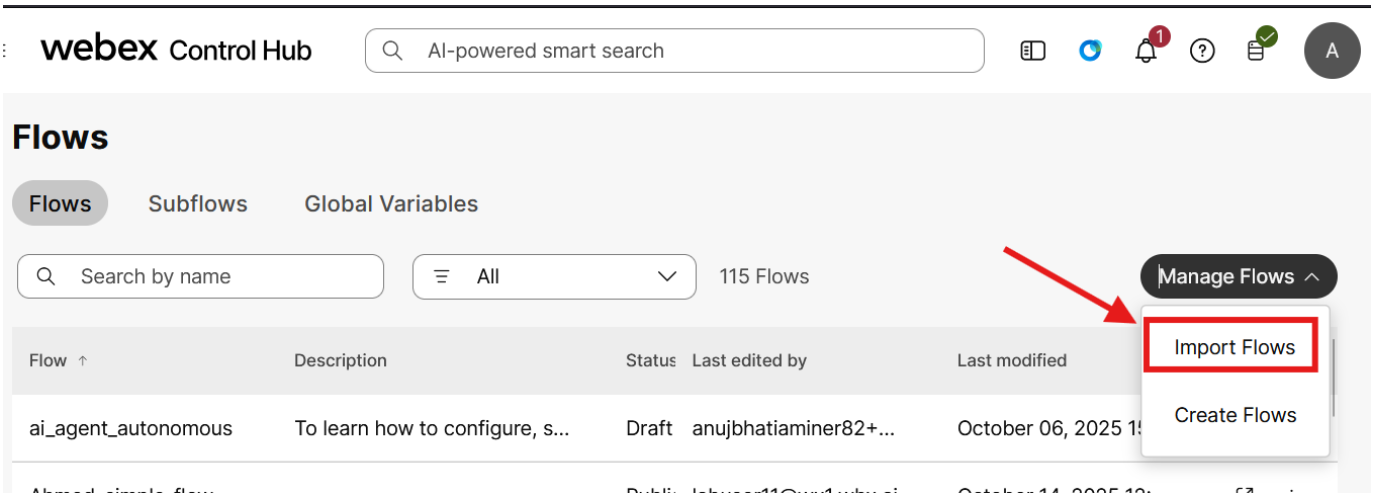
- Create 3 Global variables that are reportable as **caseid**, **description** and **subject**. Similar to below:



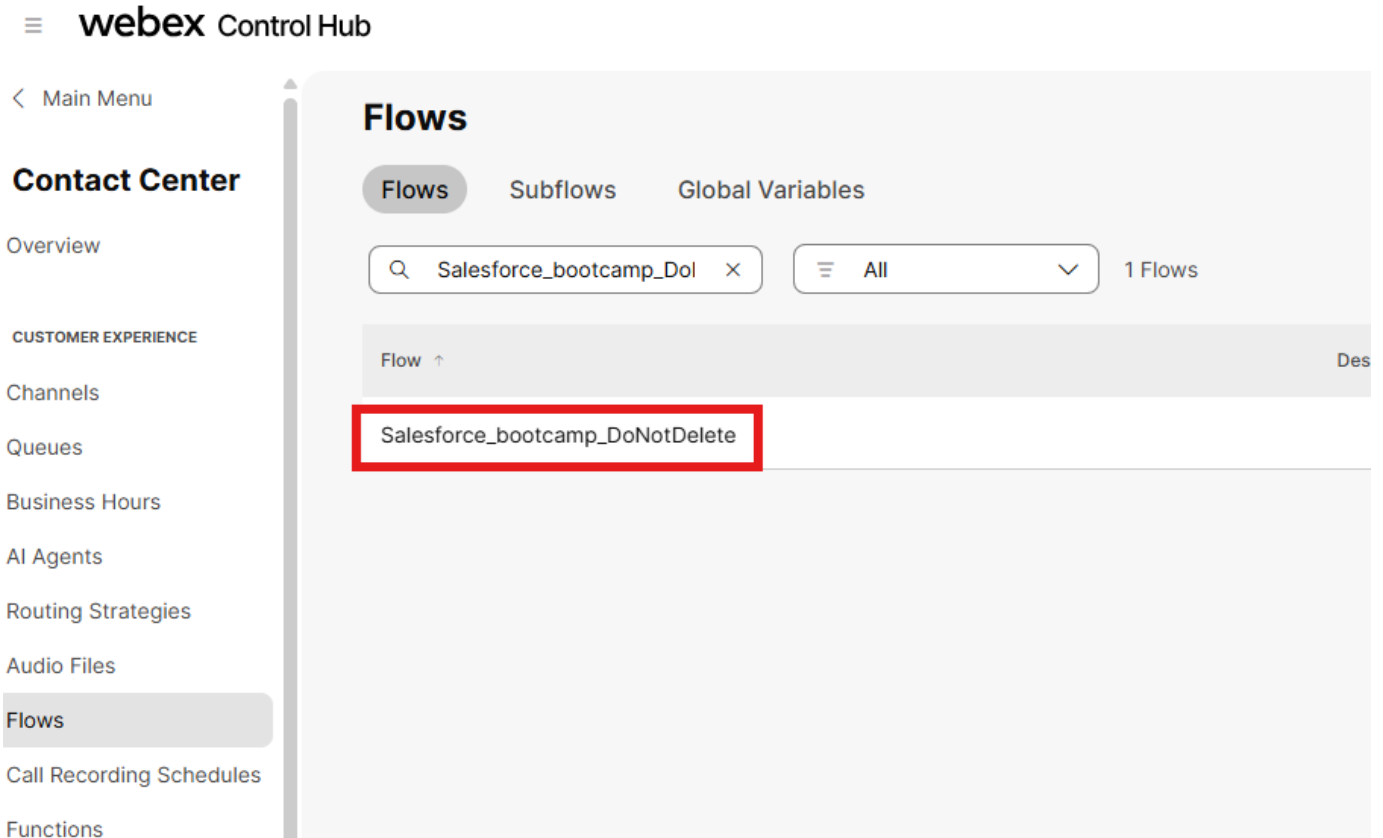
- After logging in, navigate to the 'Flows' menu on the left-hand side.



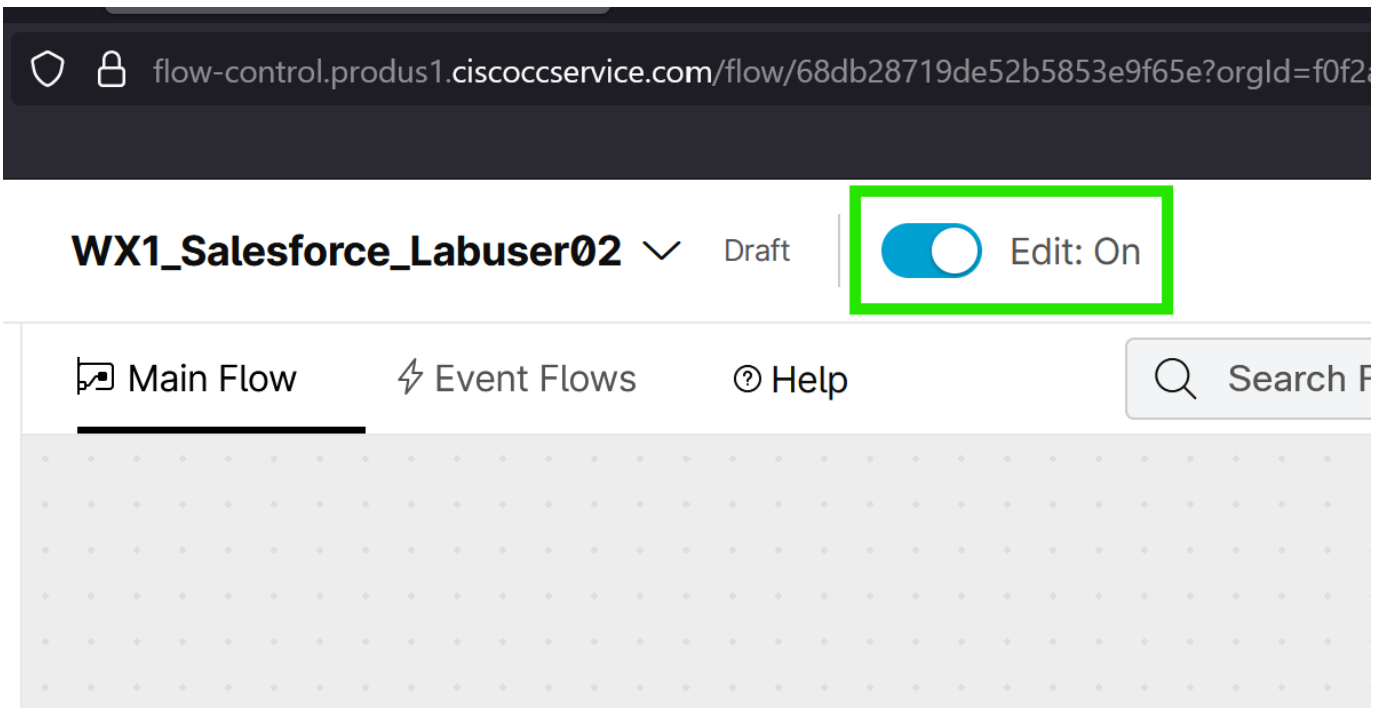
- Download this link and save the file by clicking right click and **Save As** a JSON file. Then import the flow provided:



- Search for the flow named **Salesforce\_bootcamp\_DoNotDelete\*** and **open the flow by selecting Go to Flow Designer\*\*** by clicking the icon on the right.



- Turn edit mode by: 'Edit' is set to 'On'



- Click on the queue node and enter the queue name that is setup in your sandbox that will route the call to the agent

- Click on an empty space in the flow, then on the right-hand side, scroll down to navigate to '**Custom Variables > Flow Variables**' section.
- Click on **sfurl** flow variable, select the '**Edit**' option (pencil icon), replace **NN** with the attendee number which is the fully qualified domain name (FQDN) from your Salesforce lab (e.g., *wx1-lab01-dev-ed.develop.lightning.force.com*;) as the Default Value, and click '**Save**'.

### Attention

The FQDN used for the **sfurl** variable must end with **.lightning.force.com**. While logged into the Salesforce portal, you can find the name of the Salesforce organization in the browser's address field. Note that the Salesforce Setup page will have a different domain ending (it does not end with **.lightning.force.com**). To obtain the correct FQDN, you can either navigate to the Salesforce Sales app and copy the full FQDN from the browser's address field there, or copy the Salesforce organization name from the Salesforce Setup page from the browser's address field and append it with **.lightning.force.com**.

**WX1\_Salesforce\_Labus...**  
Global Flow Properties

**Configuration** Desktop Viewability & Order

**sfurl**

**Variable Type** String

**Default Value** wx1-labNN-dev-ed.develop.lightning.force.com

**Contains Sensitive Information** No

configurable local variables. They can never  
can optionally be agent viewable.

sfurl × taskchoice ×

Add Flow Variable

✕

## Edit Flow Variable

**Name**

**Description**

**Variable Type**

String
▾

Variable Type cannot be edited once the variable is created.

**Default Value**

Variable value cannot contain backslashes or double quotes. Alphanumerics, spaces and other characters are allowed.

Enable External Override ⓘ

Contains Sensitive Information ⓘ

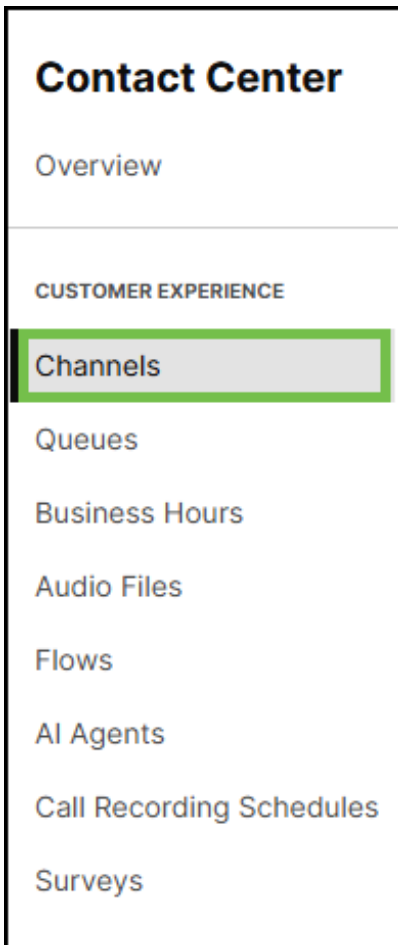
Make Agent Viewable ⓘ

Cancel
Save

- Turn Flow Validation '**On**' by clicking the '**Validation**' button at the bottom of the page to publish the flow. Once validation is complete, click '**Publish Flow**' and then '**Publish Flow**' again in the next dialog box (**Latest** version label is selected automatically).



- Navigate to the '**Channels**' menu in the Webex Contact Center configuration and map the flow and the version to a working entrypoint



- Note down the '**Support Number**' associated with this channel - it will be needed later in this lab for testing.

### Entry point settings

Service level threshold ⓘ \*  Seconds

---

Timezone (Routing strategies only) \*  ▼

---

**Routing flow**  ▼

---

Music on hold \*  ▼


---

**Version label \***  ▼

The flow version may impact the caller's experience and the variables available to override.

---

Override flow settings



**No overrides available**  
This flow doesn't have any variables set up for overrides.

---

### Phone numbers

This is the phone number customers will call to reach your business. You can select multiple from the number

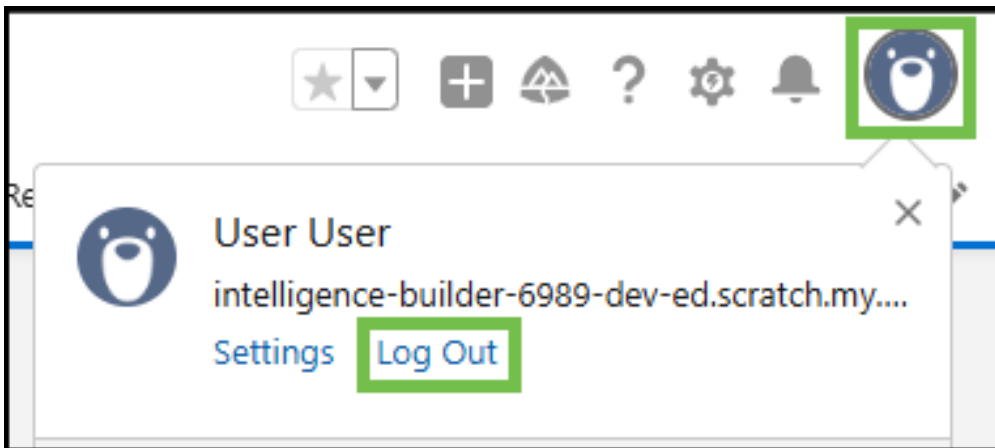
| Webex Calling location | PSTN number  |
|------------------------|--------------|
| cisco                  | +19844897493 |

### 1.6.3 3. Testing

#### **Attention**

Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

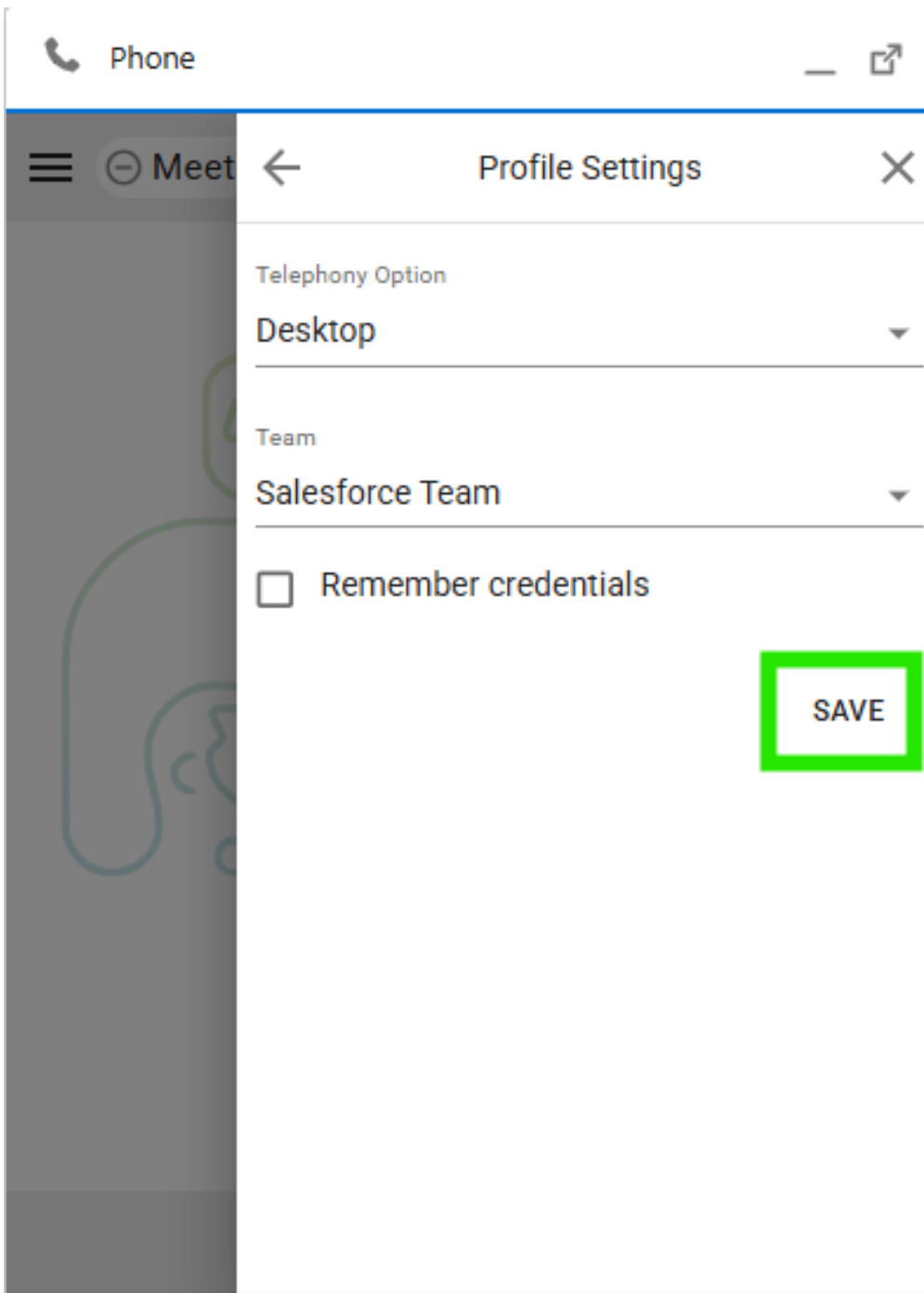
- Refresh Salesforce by logging out and logging back in (**make sure to close any other Salesforce tabs**).



- Open the Webex Contact Center phone widget and login using the selected Webex Contact Center credentials.
- For the team use **Salesforce Team**.

#### **Reminder**

Please select the '**Desktop**' option for the phone number.




- Make sure that the agent state is set to 'Available' and then call the channel number (noted from the steps above). In the IVR, choose **option 4**.
- Since Salesforce does not recognize your number, a new **Contact** create window will open with the phone number prefilled.
- Provide a name and save the contact in Salesforce.

## New Contact

\* = Required Information

### Contact Information

Contact Owner

 Lab User01

Phone

+1 408 218 1809

\* Name

Salutation

Mr.

First Name

Lab

\* Last Name

User1

Home Phone

Account Name

Search Accounts...

Mobile

Title

Other Phone

Department

Fax

Birthdate

Email

Reports To

Search Contacts...

Assistant

Lead Source

--None--

Asst. Phone

### Address Information

Mailing Address

Other Address

Mailing Country

--None--

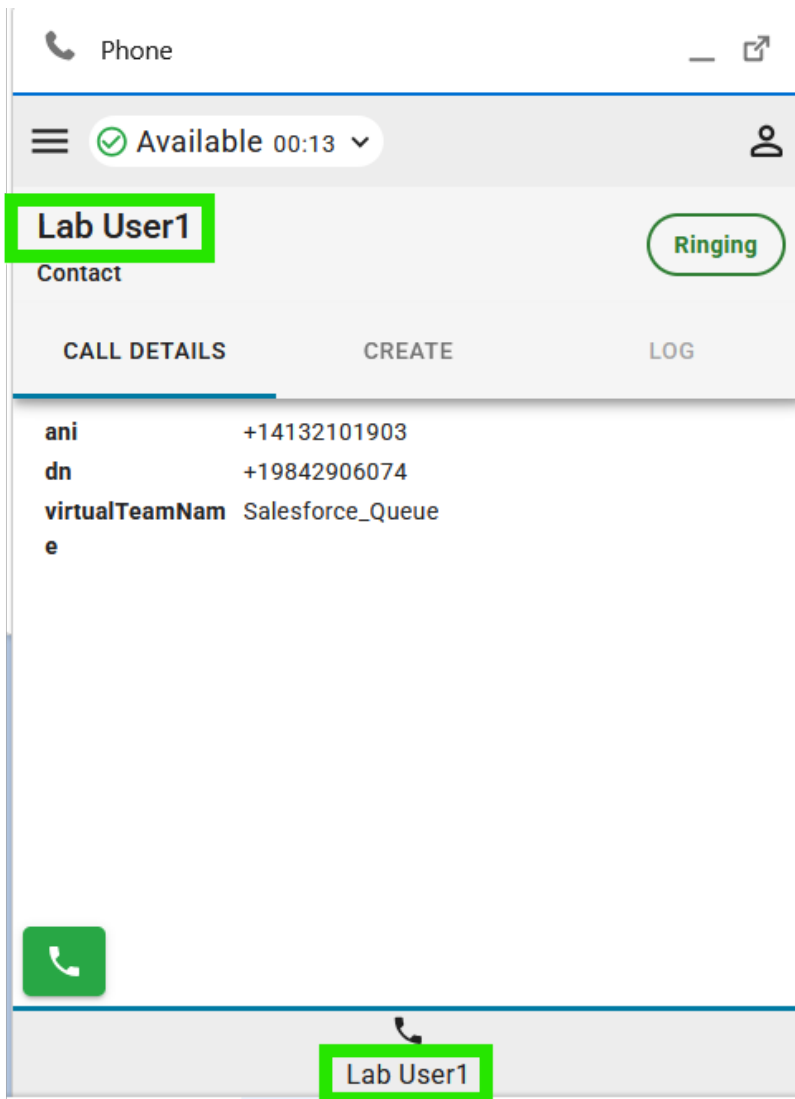
Cancel

Save & New

Save

Other Country

- End the call.
- Wrapup the session, make sure that the agent state is set to 'Available' and make another call. In the IVR, choose **option 4** again.
- This time, the system will open the matching contact, as it was created in the previous step.



- Congratulations! You have complete the task.

## 1.7 Case Lookup Using Custom CAD Variables and Agent Desktop Screen Pop

---

Please use the following credentials to complete the tasks:

|             |   |
|-------------|---|
| Control Hub | <a href="https://admin.webex.com">https://admin.webex.com</a>             |
| Salesforce  | <a href="https://login.salesforce.com/">https://login.salesforce.com/</a> |

### Info

In addition to utilizing global variables collected during the customer's interaction in the Webex Contact Center IVR, this task demonstrates the functionality of the new Webex Contact Center CRM widget for Salesforce with screen pops that operate seamlessly without triggering multiple sign-in alert errors.

### Task Objectives

- Update Salesforce Call Center settings to enable advanced screen pop with the case variable.
- Test case creation and retrieval in Salesforce via the Webex Contact Center phone widget.
- Have the case list open in a new tab during case retrieval.

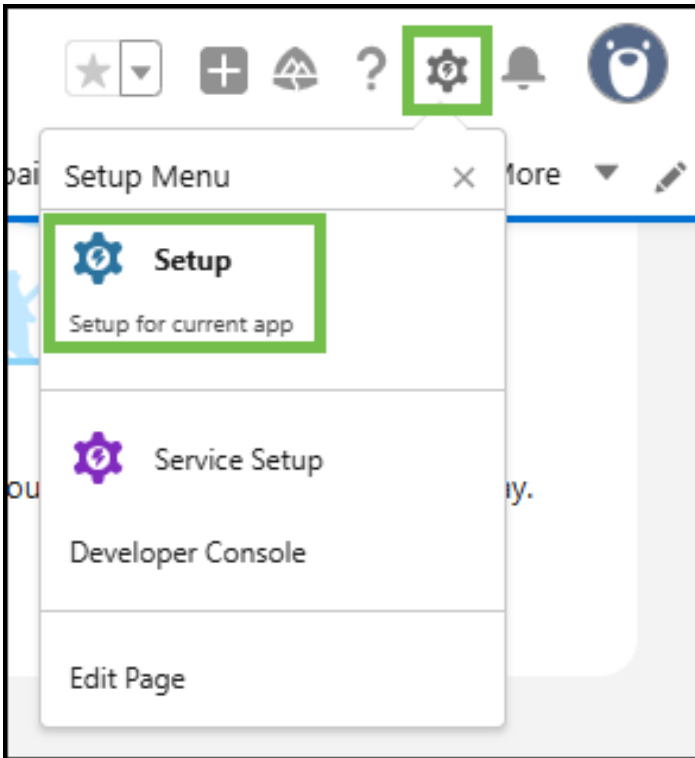
### 1.7.1 1. Modifying Call Center Options in Salesforce

---

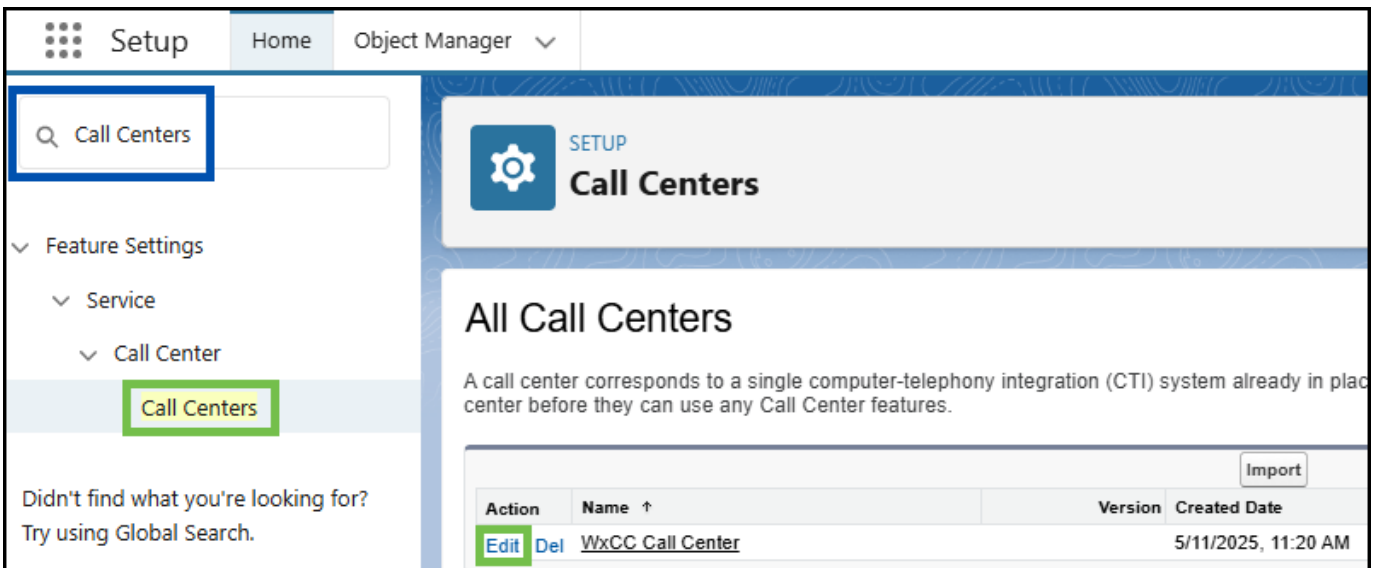
#### Attention

Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

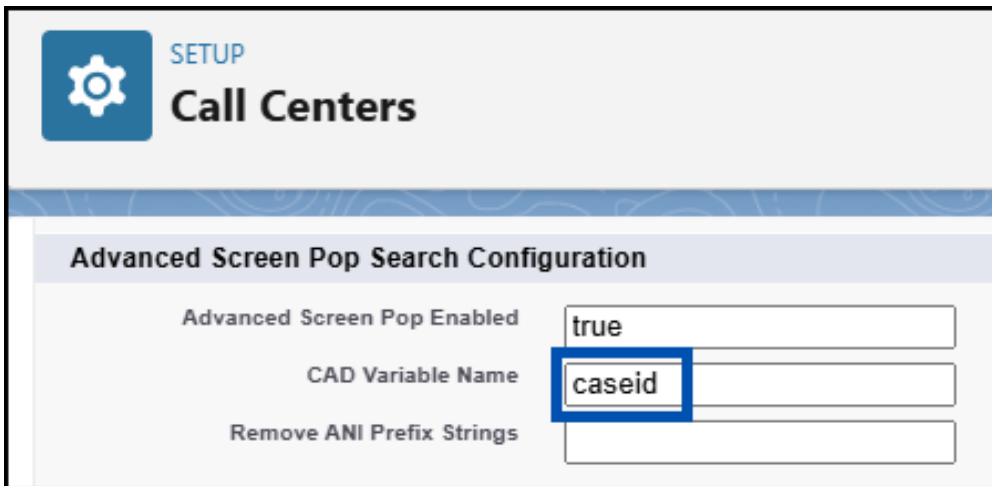
- Navigate to '**Setup**' by clicking the gear icon in the top-right corner and selecting '**Setup**'.



- Go to '**Feature Settings > Service > Call Center > Call Centers**' (or type *Call Centers* in the search bar in the left-hand menu).
- Click '**Edit**' for '**WxCC Call Center**'.



- Under '**Advanced Screen Pop Search Configuration**', set '**CAD Variable Name**' to **caseid** (type it in manually).
- Then click '**Save**'



**SETUP**  
**Call Centers**

**Advanced Screen Pop Search Configuration**

Advanced Screen Pop Enabled

CAD Variable Name

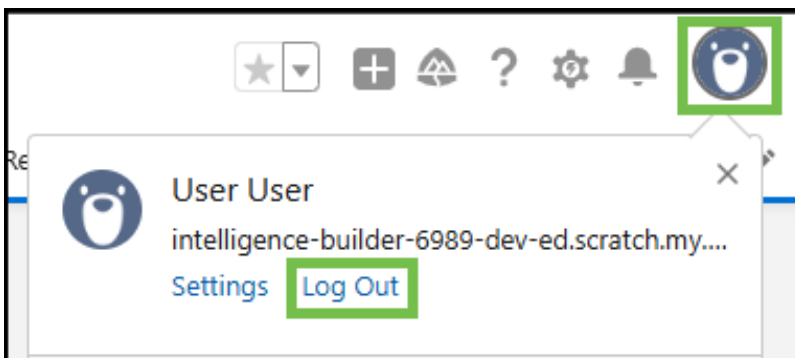
Remove ANI Prefix Strings

### 1.7.2.2. Testing

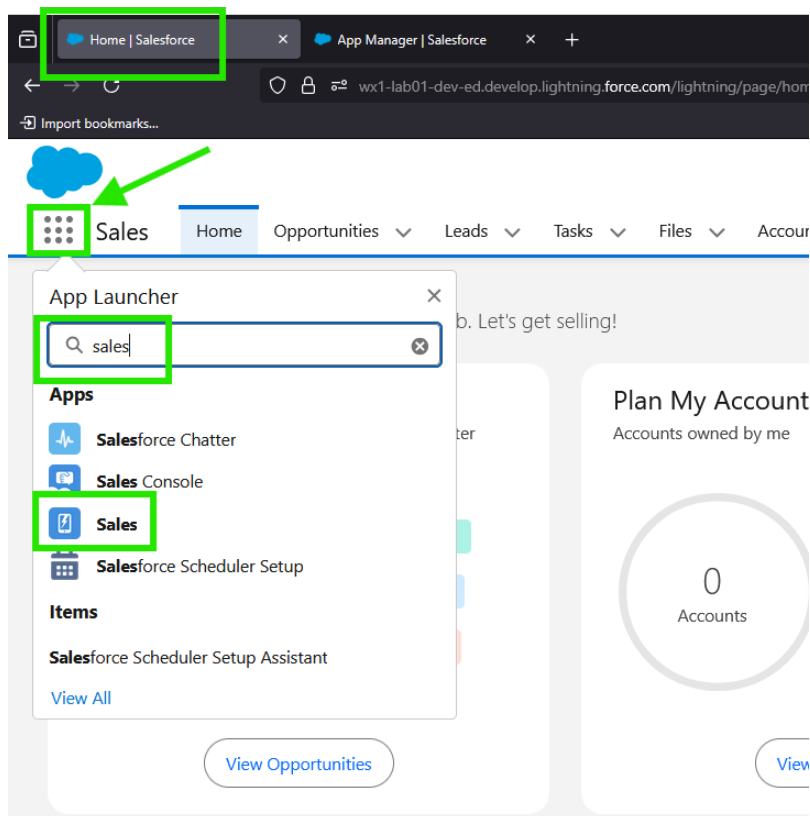
#### Attention

Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

- Refresh Salesforce by logging out and logging back in (make sure to close any other Salesforce tabs).



- Click on the '**App Launcher**' icon (top left).
- Search for *Sales* and click on the '**Sales**' option.



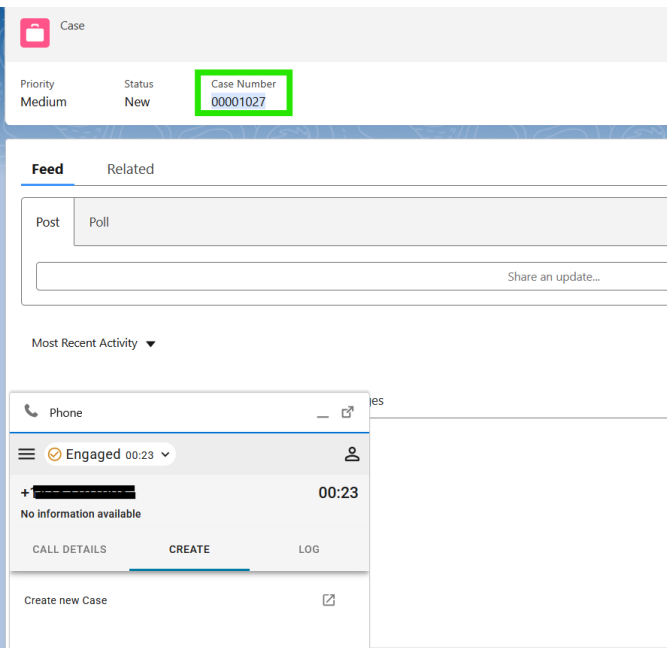
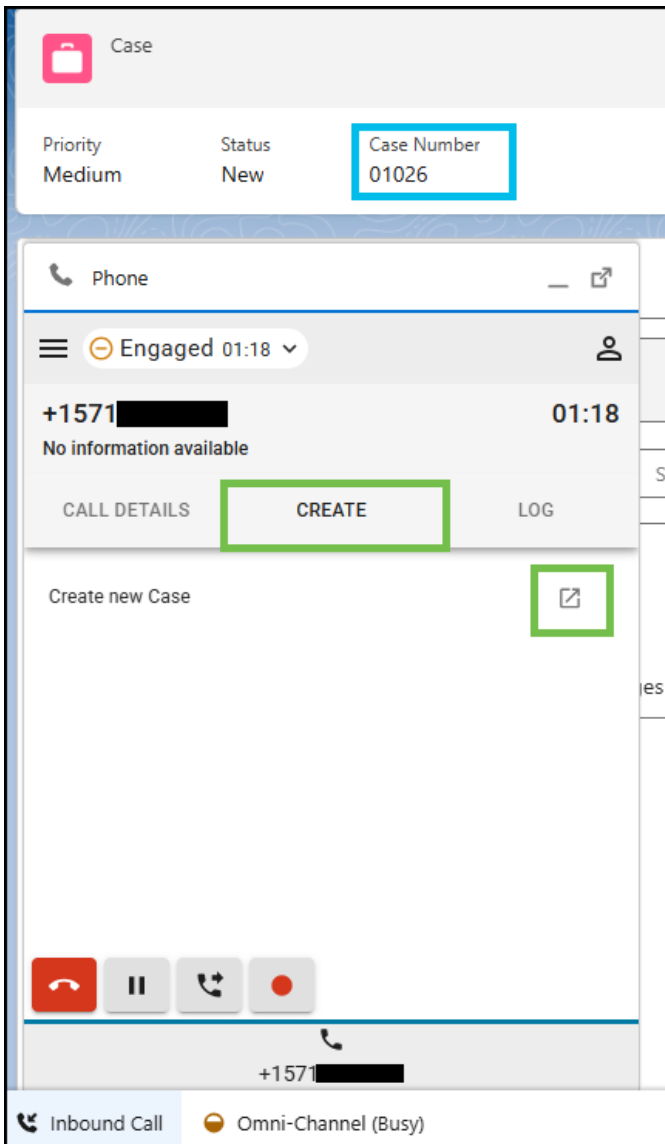
- Open the Webex Contact Center phone widget and login using the selected Webex Contact Center credentials.
- For the team use **Salesforce\_Team**.

#### Reminder

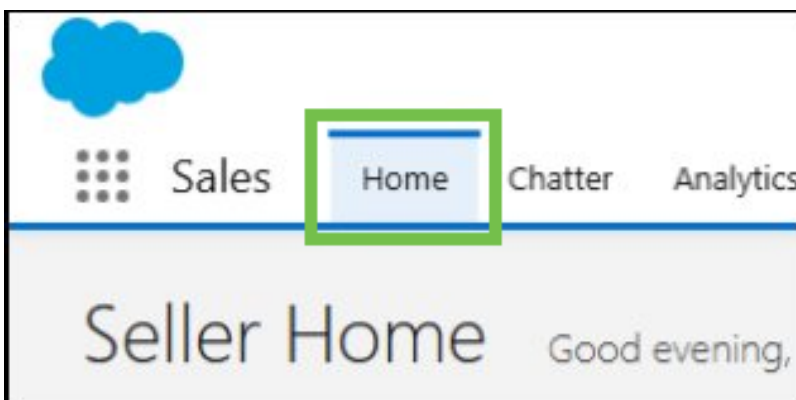
Please select the '**Desktop**' option for the phone number.

First call interaction:

- Make sure that the agent state is set to 'Available' and then call the channel number (as noted in the **Task 4**). In the IVR, choose **Option 4**.
- After answering the call select **Create a new case** (highlighted in green) through the Webex Contact Center widget and note down the **case number** (highlighted in blue) - it's going to be needed for the second call below.



- End the call.
- Wrap up the session.
- Move to the '**Home**' tab in Salesforce Sales page.

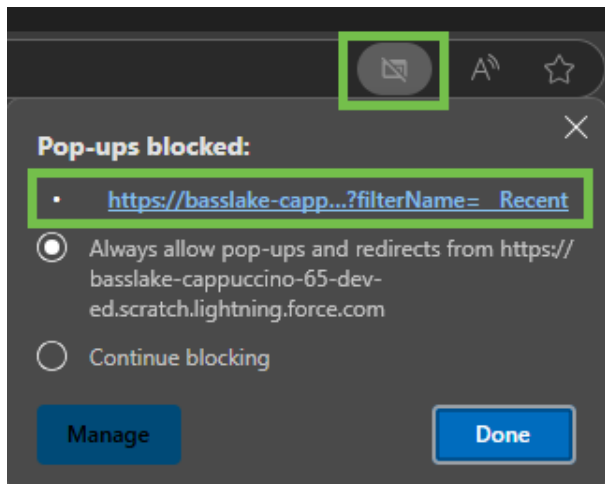


Second call interaction:

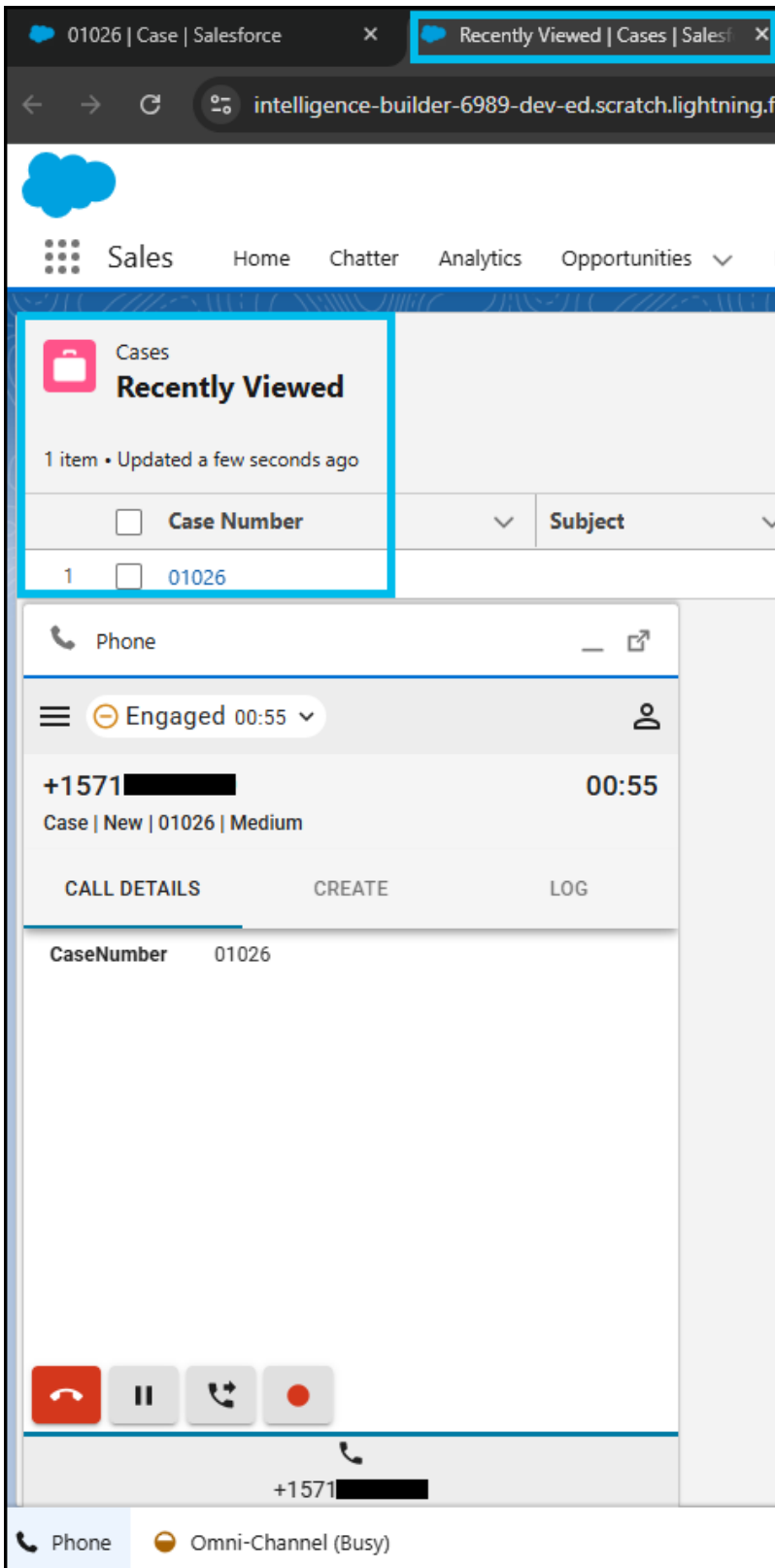
- Make sure that agent state is set to 'Available' and then call the channel number again. In the IVR, choose **Option 5**.
- Provide the case number that was created during the previous call.
- The existing case should be displayed, and the case list should be displayed in a new tab.
- Select the **Phone** icon and the same call will now show in both the tabs

### Warning

If a new tab did not open with the case list, ensure that it was not blocked by the browser. A notification will appear in the browser indicating that a new tab popup was blocked. Click on the notification and select the tab link to open the new tab.



The screenshot displays a Salesforce web interface. At the top, there are two browser tabs: "01026 | Case | Salesforce" and "Recently Viewed | Cases | Salesforce". The address bar shows the URL "intelligence-builder-6989-dev-ed.scratch.lightning.f". The main navigation bar includes "Sales", "Home", "Chatter", "Analytics", and "Opportunities". Below this, a "Case" record is shown with a pink icon. The record details include "Priority: Medium", "Status: New", and "Case Number: 01026". A call log is overlaid on the case record, showing a "Phone" call with a duration of "00:21" and a status of "Engaged". The call log includes a phone icon, a menu icon, a status indicator, a phone number "+1571 [REDACTED]", and a duration "00:21". Below the call log, there are buttons for "CALL DETAILS", "CREATE", and "LOG". A table entry shows "CaseNumber" as "01026". At the bottom of the call log, there are icons for "End Call", "Pause", "Transfer", and "Hold". The bottom status bar shows "Inbound Call" and "Omni-Channel (Busy)".



**The Why of This Exercise**

In the new salesforce connector we have solved the multi-sign in concerns when agent desktop is logged into 2 seperate tabs

- Congratulations! You have complete the task.

## 1.8 Automatic New Case Creation Using Custom CAD Variables

---

|             |                               |
|-------------|-------------------------------|
| Control Hub | https://admin.webex.com       |
| Salesforce  | https://login.salesforce.com/ |



This task demonstrates the automatic case creation capability using the new Webex Contact Center (WXCC) Salesforce Connector, leveraging custom CAD variables from Webex Contact Center. In this section we will pass the Call Session ID in the case on salesforce if this needs to be gathered for troubleshooting purposes.

### Task Objectives

- Enable auto case creation via the Salesforce Call Center configuration file.
- Set up CAD variable field mapping for auto case creation in the Salesforce Call Center settings.
- Test the auto case creation and CAD variable field mapping.

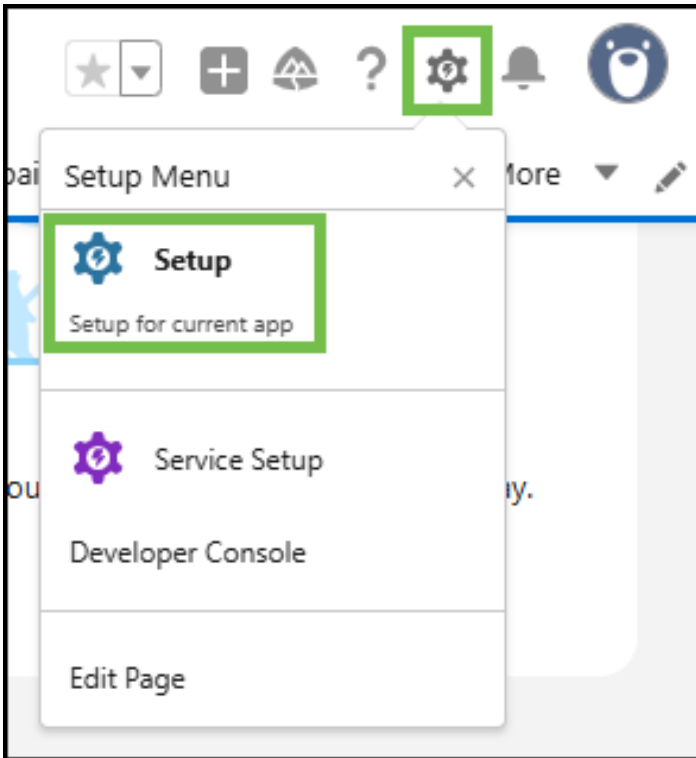
### 1.8.1 1. Modifying Call Center Options in Salesforce

---

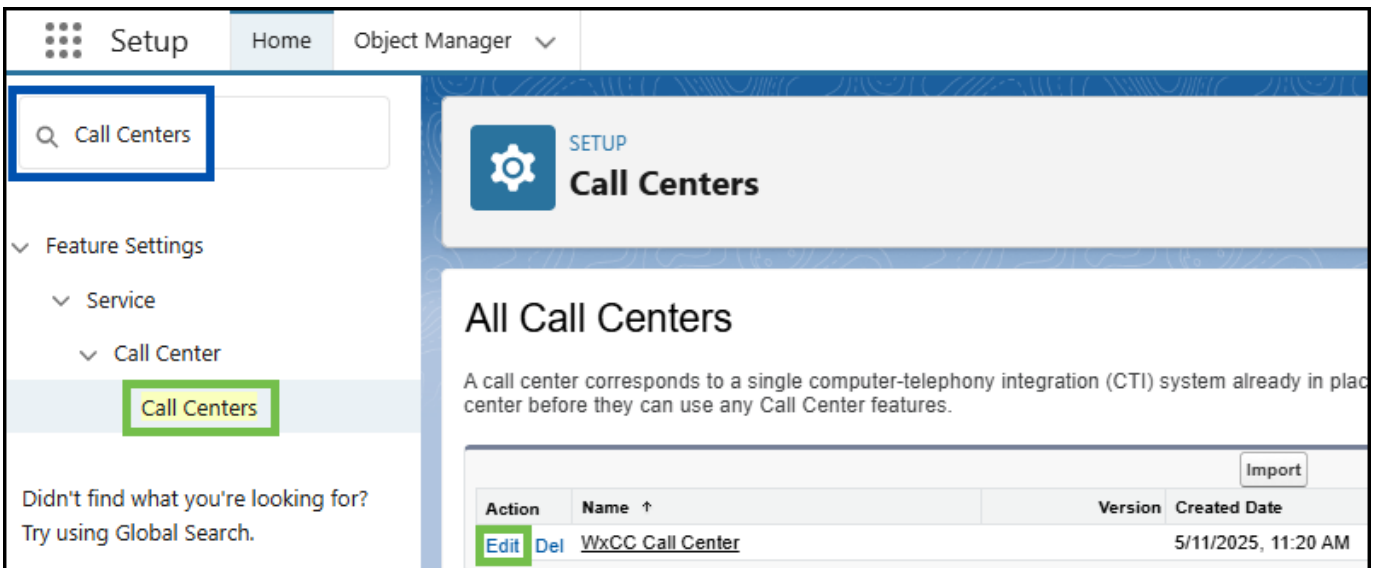
#### Attention

Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

- Navigate to '**Setup**' by clicking the gear icon in the top-right corner and selecting '**Setup**'.



- Go to '**Feature Settings > Service > Call Center > Call Centers**' (or type *Call Centers* in the search bar in the left-hand menu).
- Click '**Edit**' for '**WxCC Call Center**'.



- Under '**Advanced Screen Pop Search Configuration**', remove '**CAD Variable Name**' value (make it empty).
- Under '**Case Management**', set '**Auto Case Creation For Inbound Calls**' to **true** (type it in manually) and '**Object Field Mappings**' as follows and click '**Save**':

```
Subject={subject},Description={description}
```



SETUP

# Call Centers

## Advanced Screen Pop Search Configuration

|                             |                                   |
|-----------------------------|-----------------------------------|
| Advanced Screen Pop Enabled | <input type="text" value="true"/> |
| CAD Variable Name           | <input type="text"/>              |
| Remove ANI Prefix Strings   | <input type="text"/>              |

## Case Management

|                                       |  |
|---------------------------------------|--|
| Auto Case Creation For Inbound Calls  | <input type="text" value="true"/>                          |
| Auto Case Creation For Outbound calls | <input type="text" value="false"/>                         |
| Open Case Object In Edit Mode         | <input type="text" value="false"/>                         |
| Object Field Mappings                 | <input type="text" value="Subject={subject},Description"/> |

## Screen Pop Settings For No Record Match

|                       |  |
|-----------------------|--|
| Object Field Mappings | <input type="text" value="Phone={ani}"/> |
|-----------------------|--|

## Omni-Channel State Sync Configuration

|                               |                                       |
|-------------------------------|---------------------------------------|
| Enable Omni-Channel Sync      | <input type="text" value="true"/>     |
| Omni-Channel Not Ready Reason | <input type="text" value="wxccbusy"/> |
| WxCC Idle Reason Code         | <input type="text" value="sfbusy"/>   |

## Widget Settings

|                            |                                    |
|----------------------------|------------------------------------|
| Send Browser Notifications | <input type="text" value="false"/> |
|----------------------------|------------------------------------|