# LAB-2308

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

*Anuj Bhatia, D.K Singh, Bhushan Suresh*

# Table of contents

# 1. Lab

## 1.1 Introduction

### 1.1.1 Learning Objectives

This lab session is an **intermediate level** session intended for engineers with prior **Webex Contact Center** experience and either basic or no knowledge of the Webex Contact Center integration with **Salesforce** customer relationship management (CRM) system.

In this lab session, you will explore the capabilities of the **Legacy Webex Contact Center CRM Connector** and **New Webex Contact Center CRM Connector** for **Salesforce** that enables you to manage voice interactions while accessing customer information within Salesforce. You will gain hands-on experience with seamless screen pops, activity logging, case management, and other features — all integrated into a streamlined, user-friendly agent interface.

**Task Objectives**

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

### 1.1.2 Resource links

**Salesforce - Version 1-Legacy**

| | |
|---|---|
| `Integration Guide` | 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)/ |
| `Latest Updates` | https://login.salesforce.com" target="_blank">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/ |

**Salesforce - Version 2-New**

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

**Differentiate between versions**

| | |
|---|---|
| `Guide` | https://techzone.cisco.com/t5/Contact-Center-3rd-Party/Playbook-CRM-Connector-Version-Matrix-Install-Store-Link/ta-p/16910365/ |

## 1.2 Task 0 - Integrate Webex Contact Center with Salesforce Using the Legacy CRM Connector

Please use the following credentials to complete the tasks:

| | |
|---|---|
| `Control Hub` | https://admin.webex.com |
| `Salesforce` | https://login.salesforce.com/ |
| `Salesforce Developer Edition` | Sign up link: https://www.salesforce.com/products/free-trial/developer/ |

**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 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**

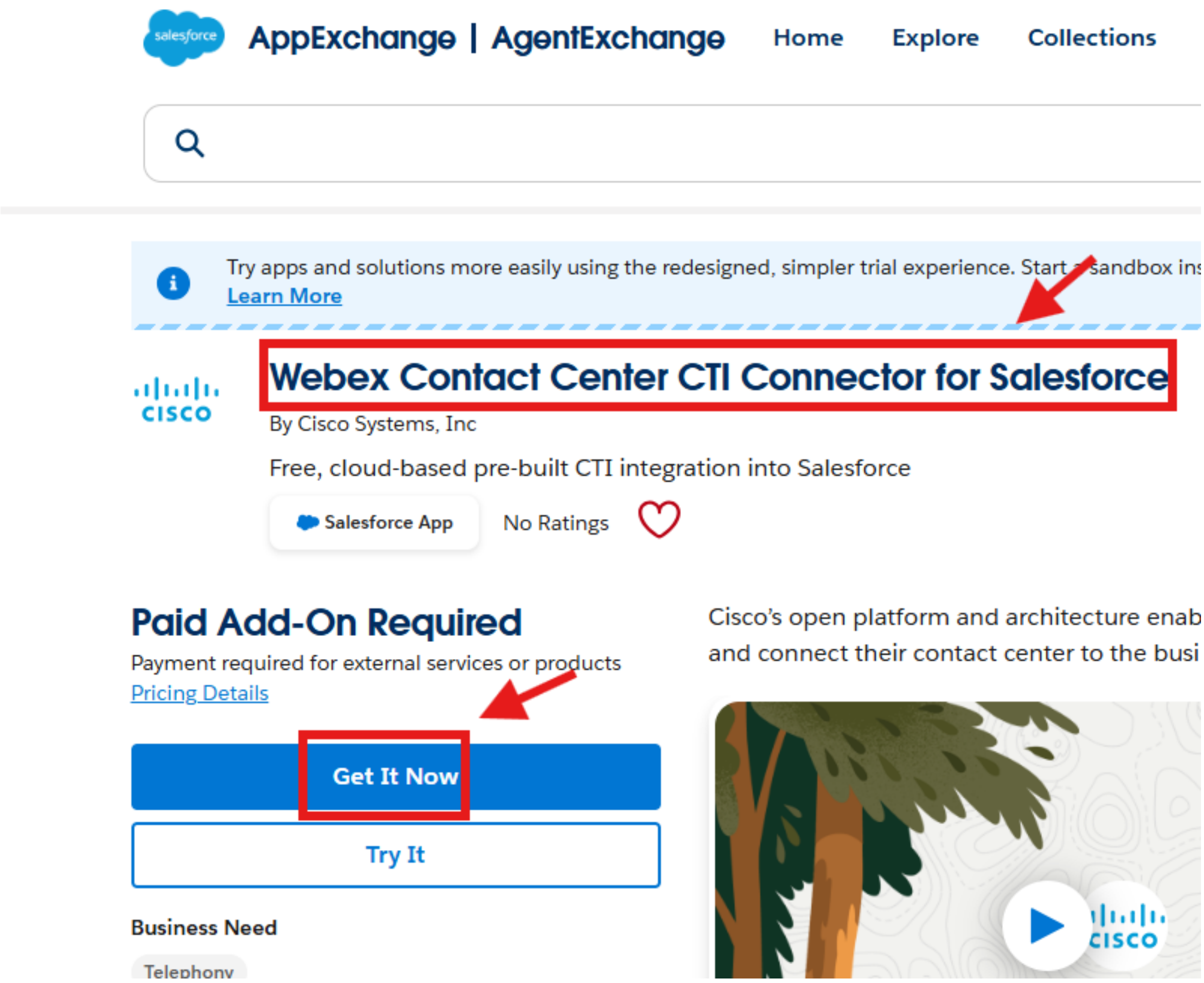
Trial account only expires if its not logged in alteast once in 45 days.

### 1.2.2 Section 1 - Connector Installation

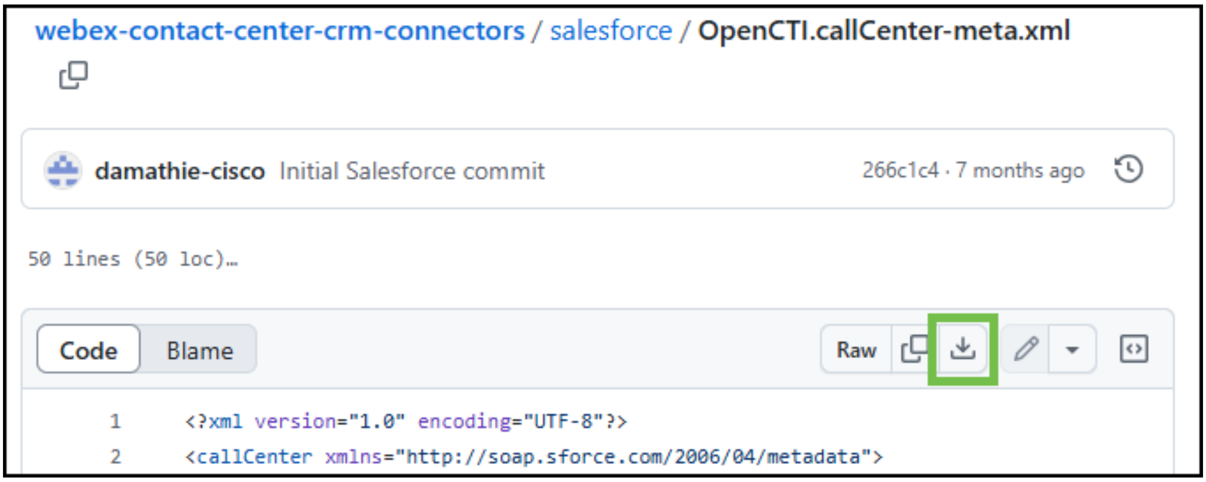
**Attention**

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

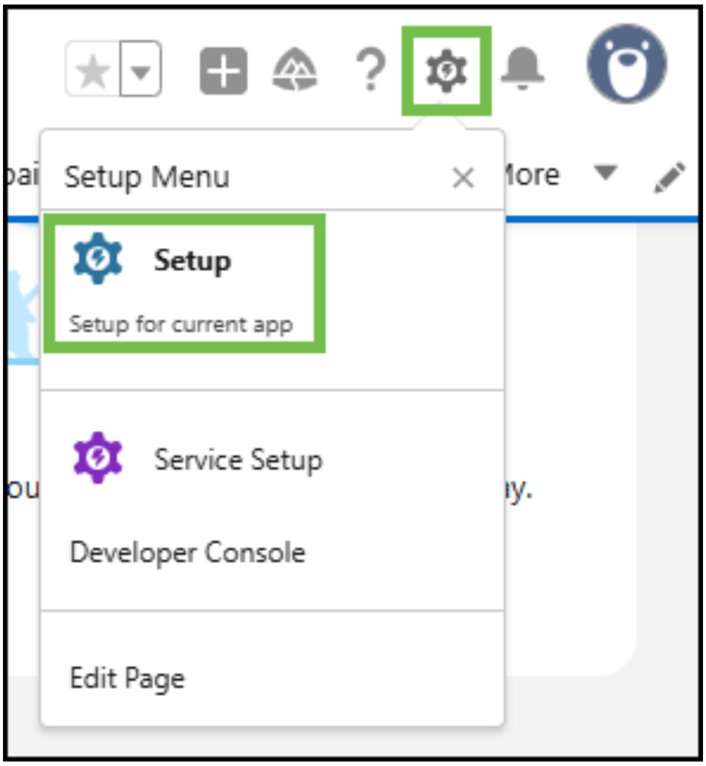
- Navigate to Salesforce AppExchange portal: https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000008YM3bEAG/ and install the log in and install **Webex Contact Center CTI Connector for Salesforce** by selecting **Get It Now**.
- You may need to be asked to relogin to complete the above step.



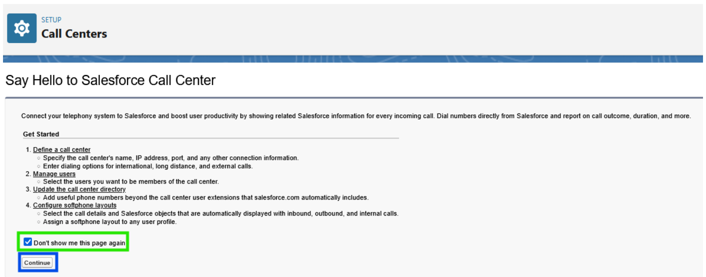

• Visit the Github repository to download the latest call center definition file - https://github.com/webex/webex-contact-center-crm-connectors/blob/main/salesforce/OpenCTI.callCenter-meta.xml (click **'Download raw file button'**).



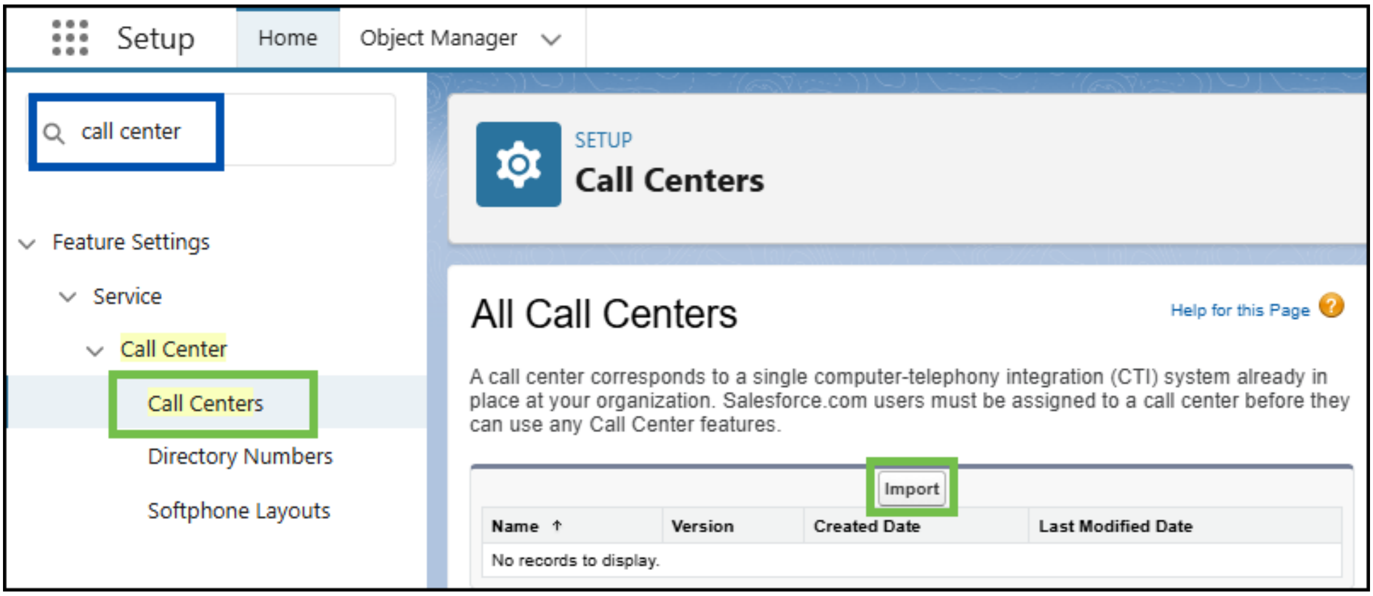

• In Salesforce, navigate to **'Setup'** by clicking the gear icon in the top-right corner and selecting **'Setup'**.

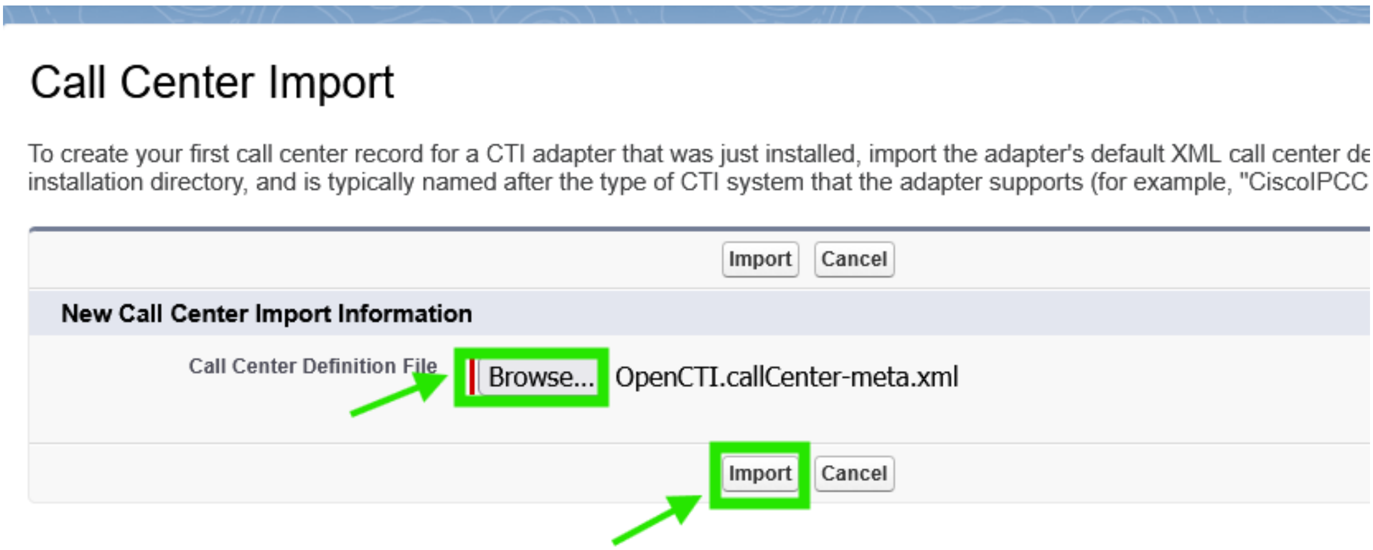



- In the Salesforce portal, navigate to **'Feature Settings > Service > Call Center > Call Centers'** (or type *Call Centers* in the search bar above the left-hand menu).
- Select **Don't show me this page again** and hit **Continue**.



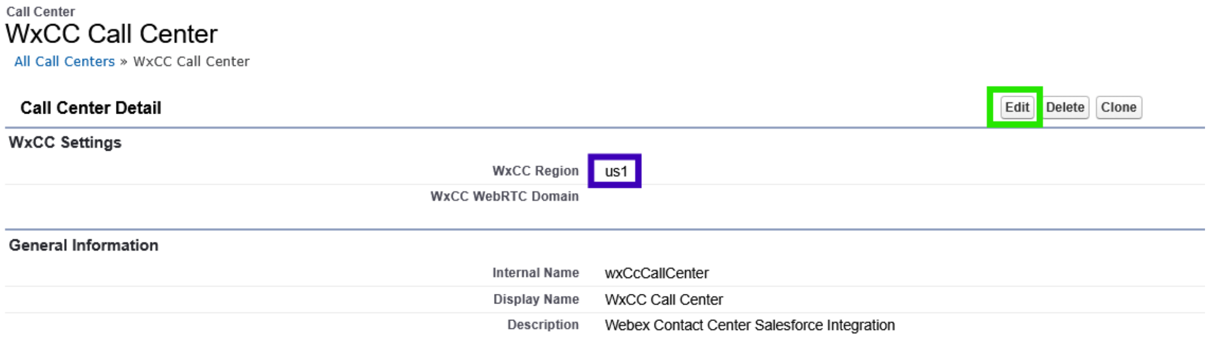

- Click **'Import'**, select **'Browse'** and choose the call center definition file (downloaded earlier).
- Click **'Import'** again to save the added file.



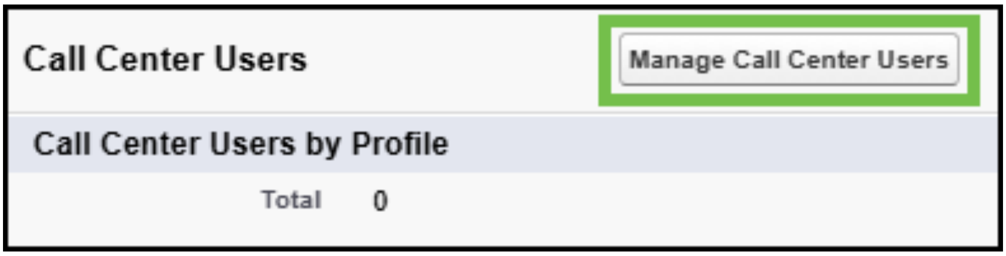



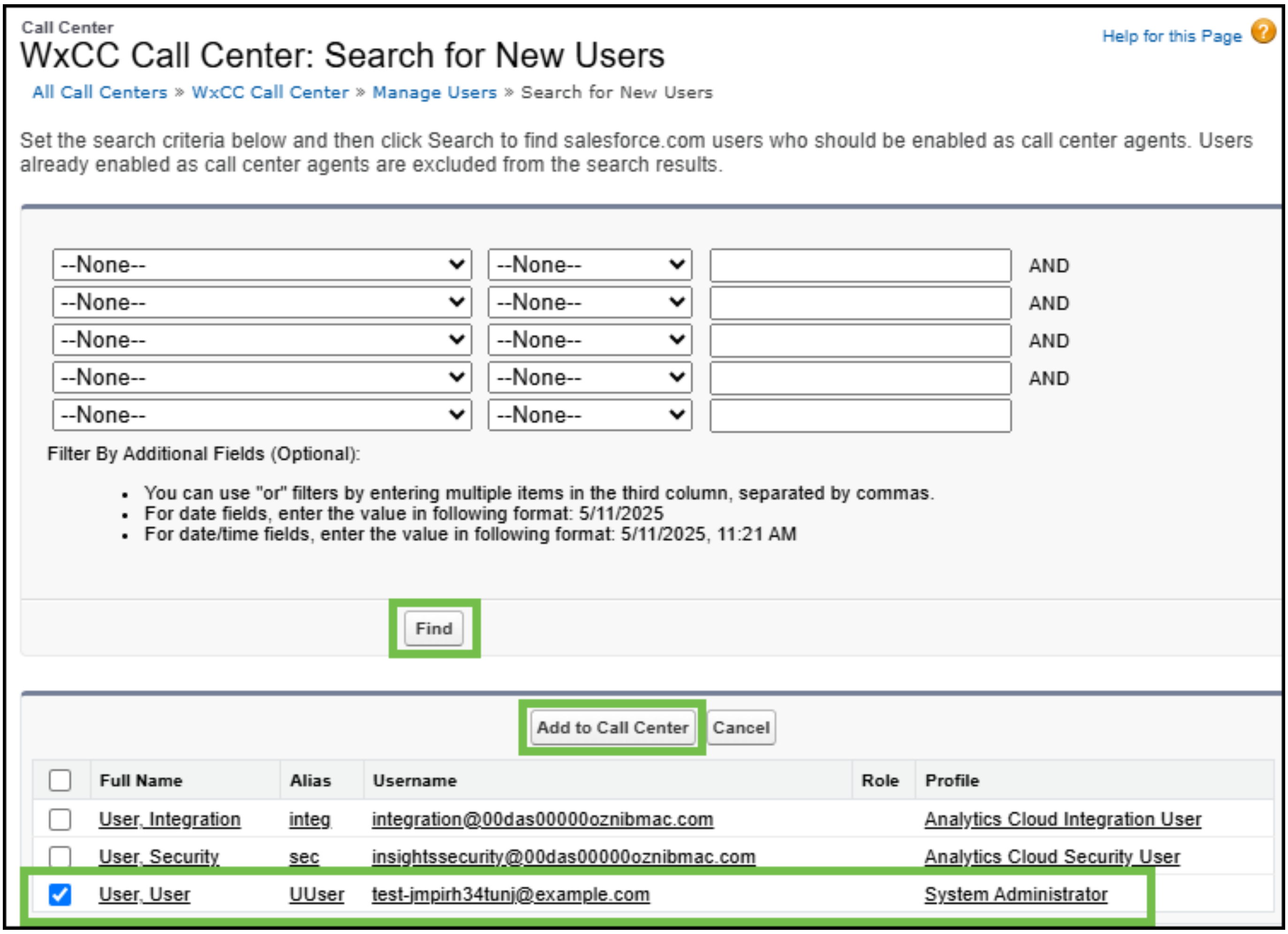

- After the call center definition file is imported, edit it by clicking **'Edit'**.
- Change **'WxCC Region'** to **'us1'**.

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



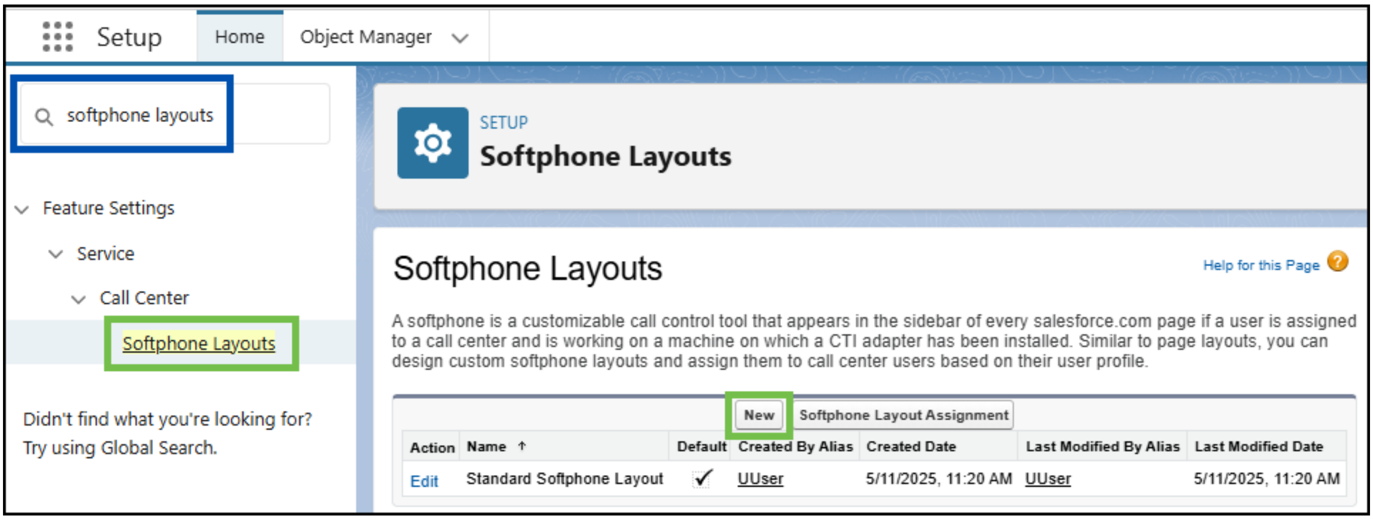

- Click **'Save'**.
- Add users to the Call Center:
- Click **'Manage Call Center Users'** at the bottom of the page and then **'Add More Users'**.
- Click **'Find'**, select the lab user in use (*labuser**ID**@wx1.wbx.ai*), and click **'Add to Call Center'**.



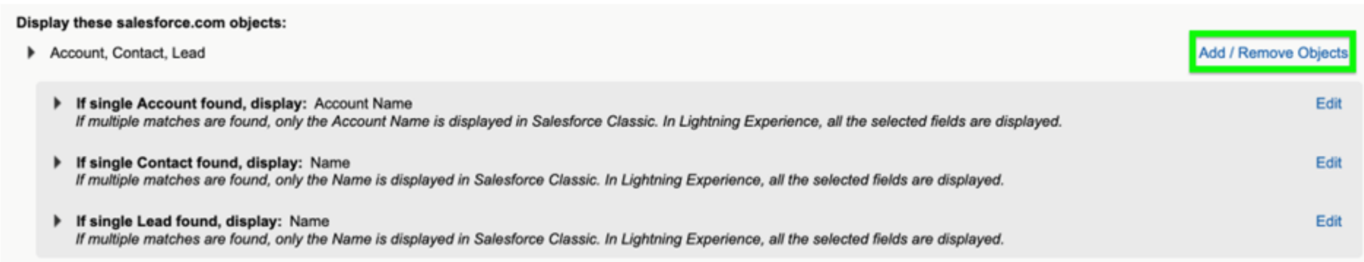



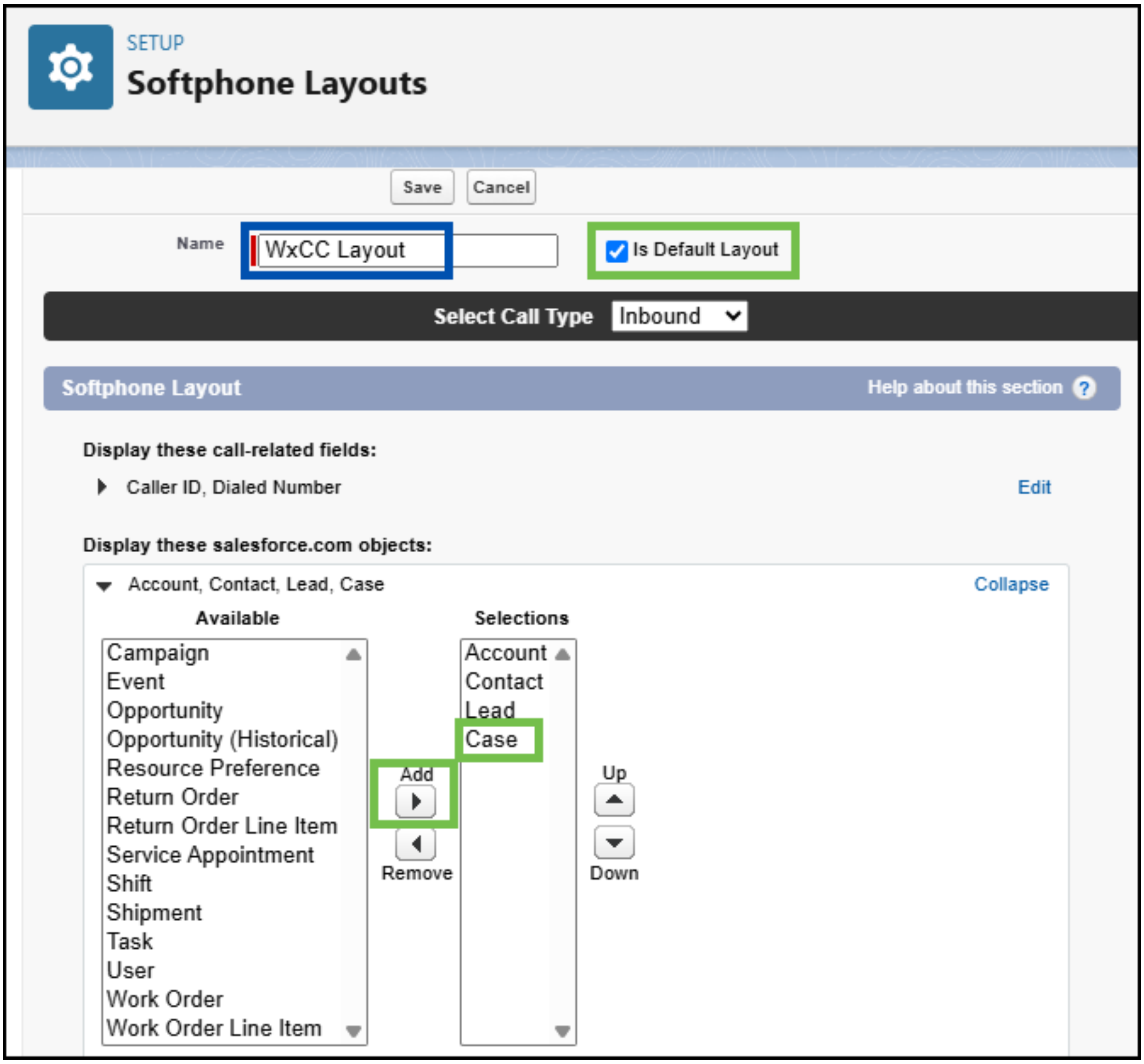
## 1.2.3 **Section 2 - Configure Softphone Layout**

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

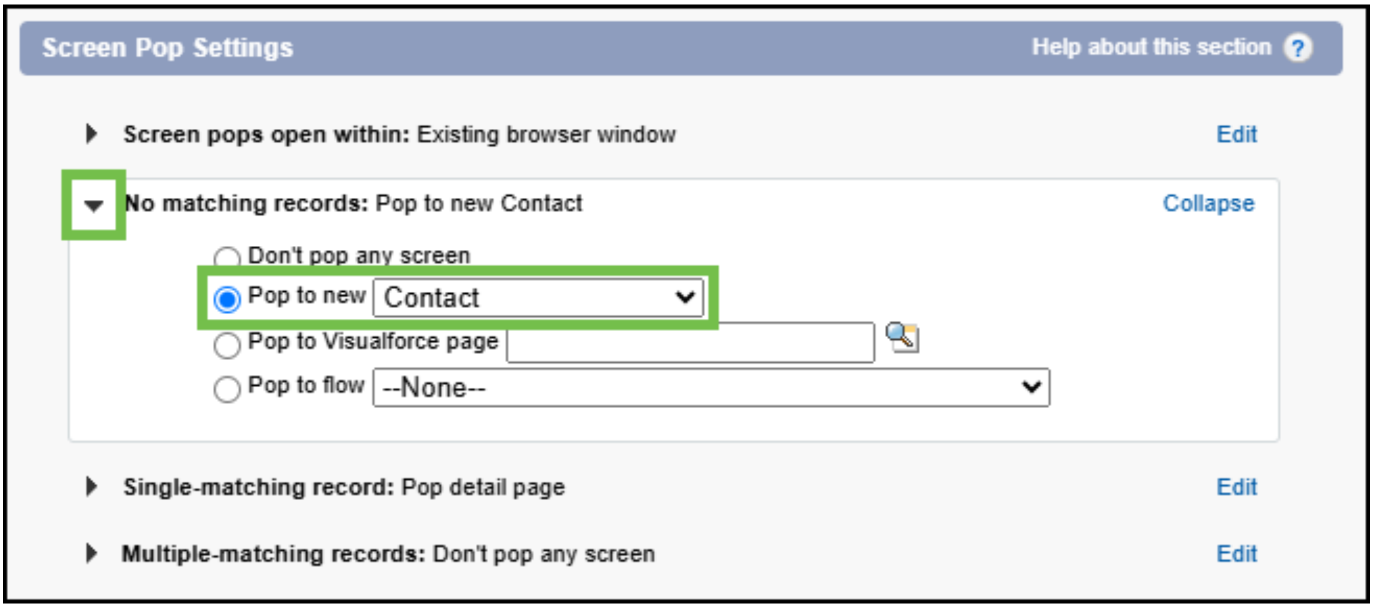



- Provide a name for the **'Softphone Layout'** (e.g., *WxCC layout*).
- Select the **'Is Default Layout'** checkbox.
- Under **'Display these salesforce.com objects'**, click on **'Add/Remove Objects'** and add 'Case'.






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

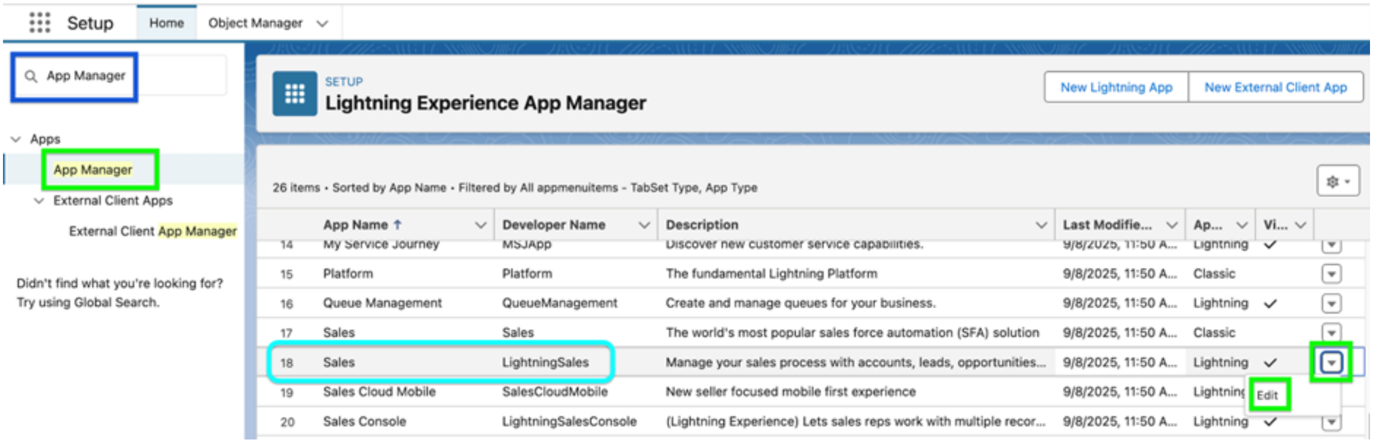


> **Note**
>
> Other Salesforce objects can be selected here as well. **'Contact'** is used as an example in this exercise.

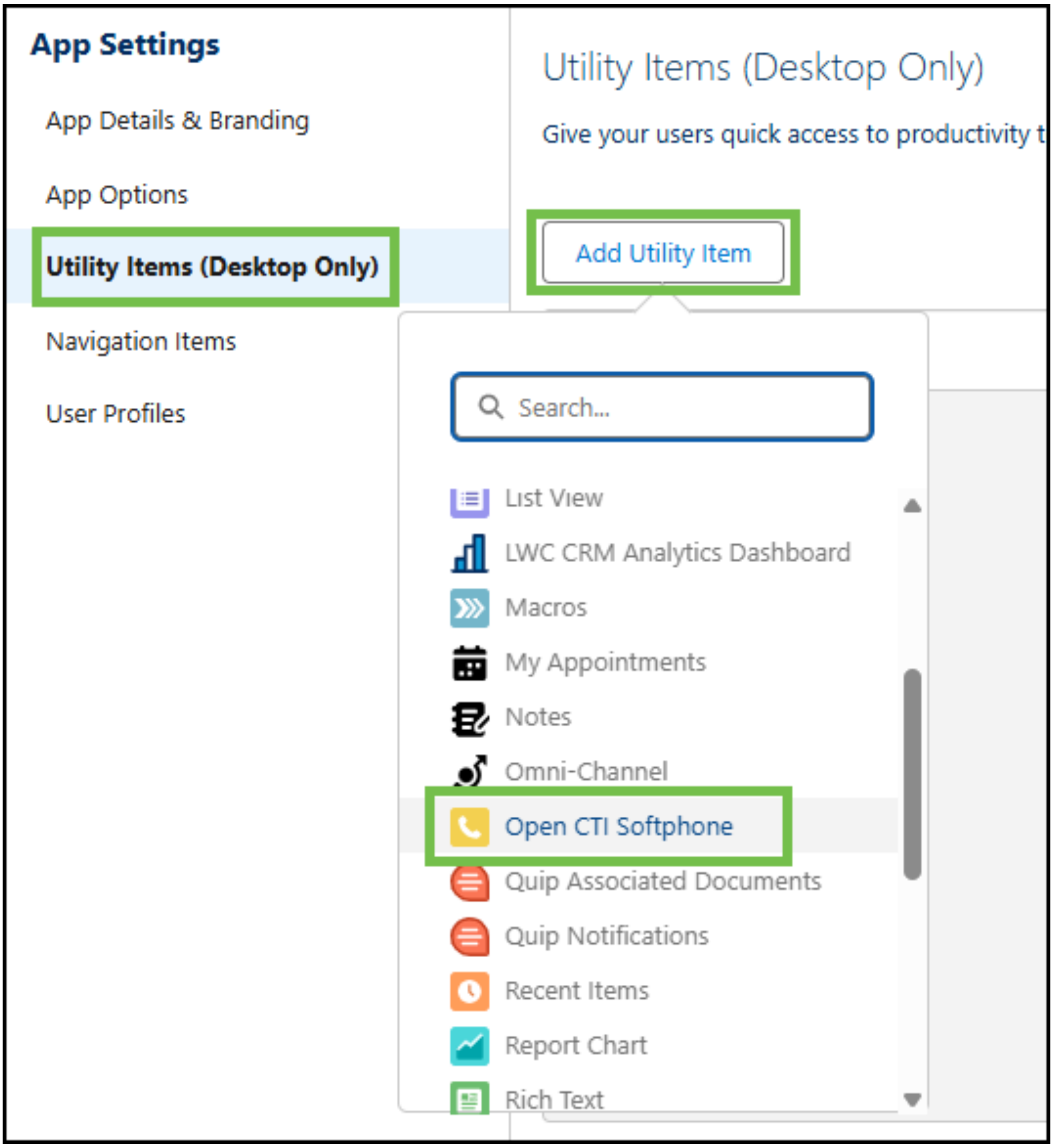
- Click **'Save'** at the top.

### 1.2.4 **Section 3 - Configure CTI Softphone**

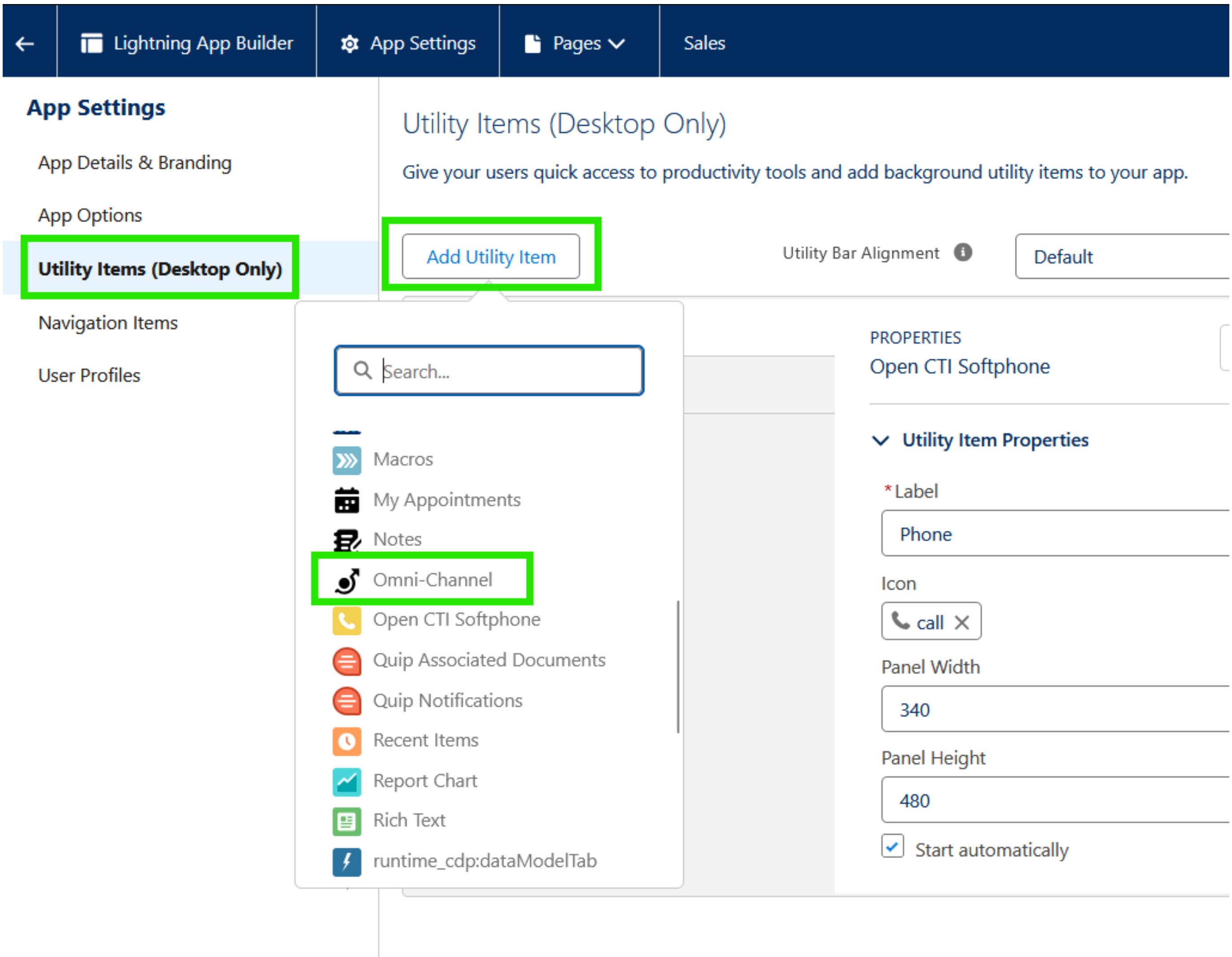
- Navigate to **'Apps > App Manager'** (or type *App Manager* in the search bar above the left-hand menu).
- For the **'Sales'** app (line number 18; **'LightningSales'** developer) click **'Edit'** on the right-hand side.



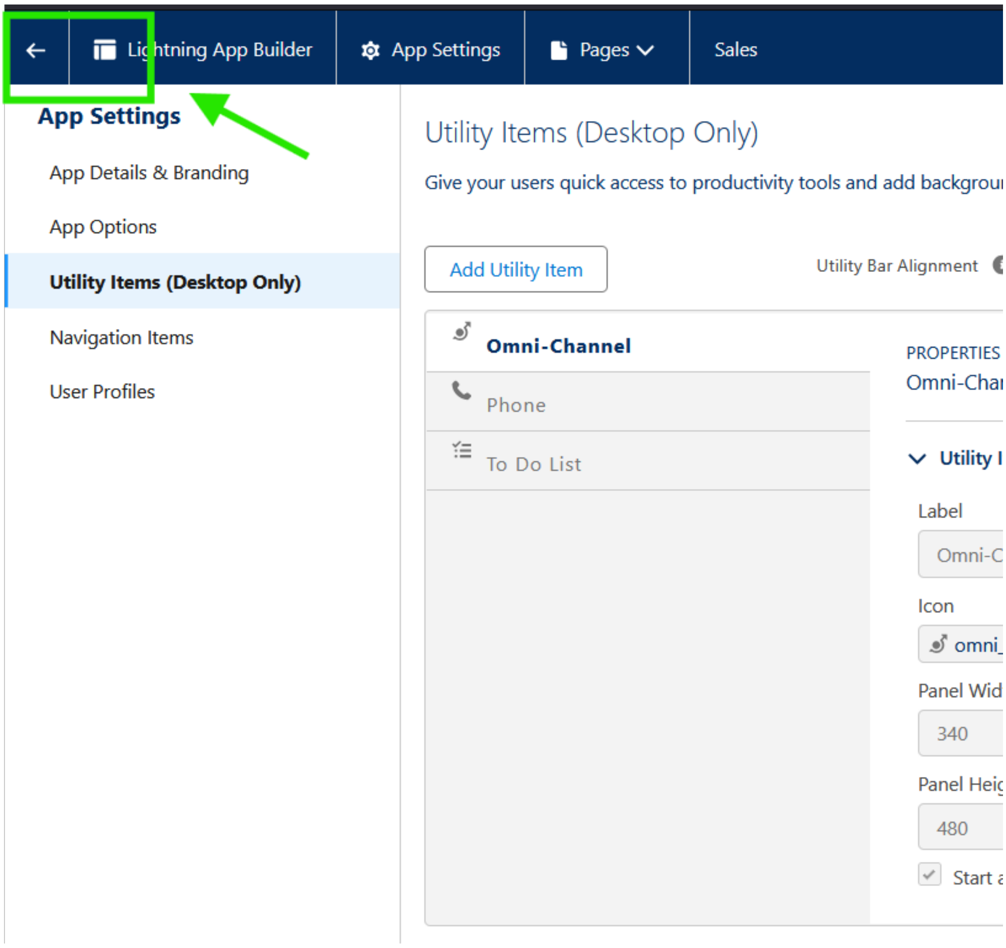

- In the next window, select **'Utility Items (Desktop Only)'**.
- Click **'Add Utility item'** and choose **'Open CTI Softphone'**.




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



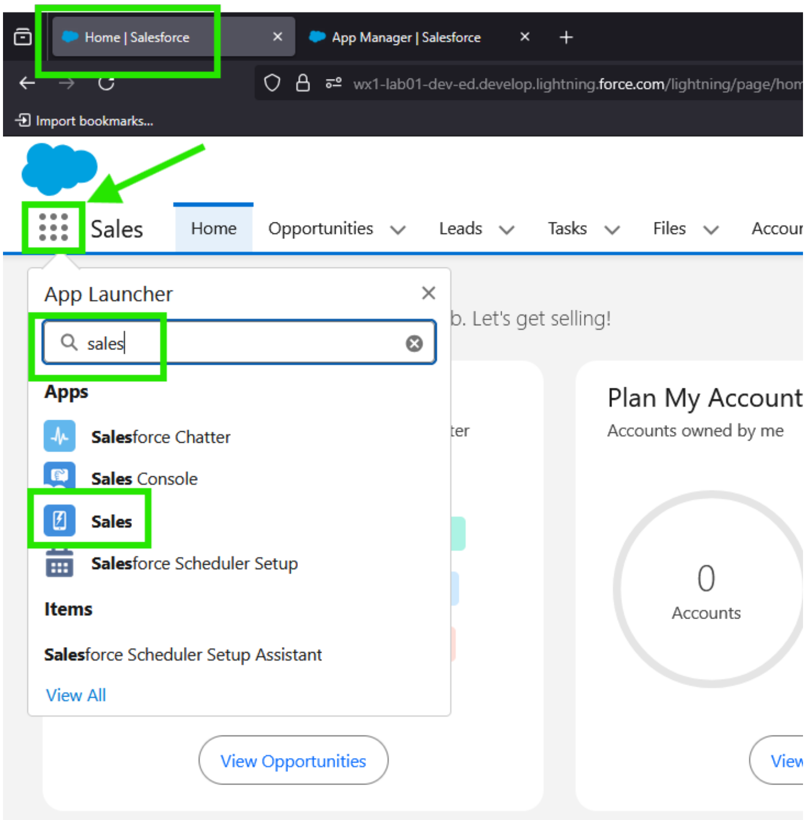

• Click **'Save'** and return to the previous page by clicking the back arrow icon at the top left corner.



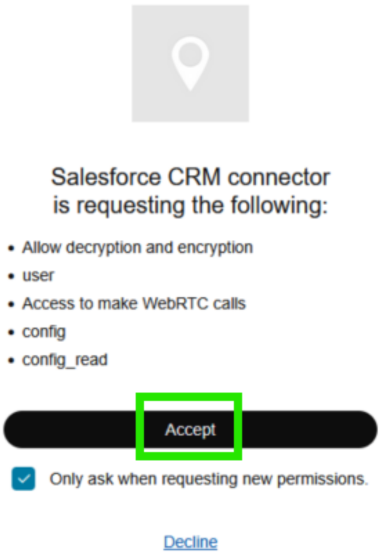

## 1.2.5 Section 4 - Testing

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

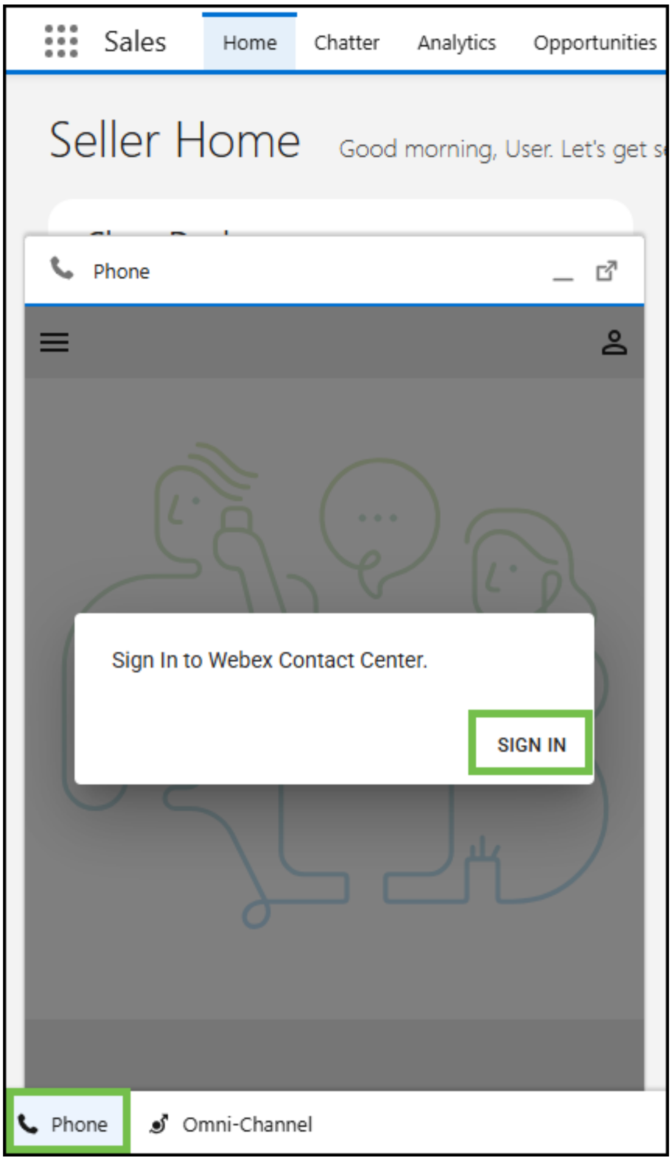
- From the Salesforce Home page, click on the **'App Launcher'** icon (top left).
- Search for *Sales* and click on the **'Sales'** option.

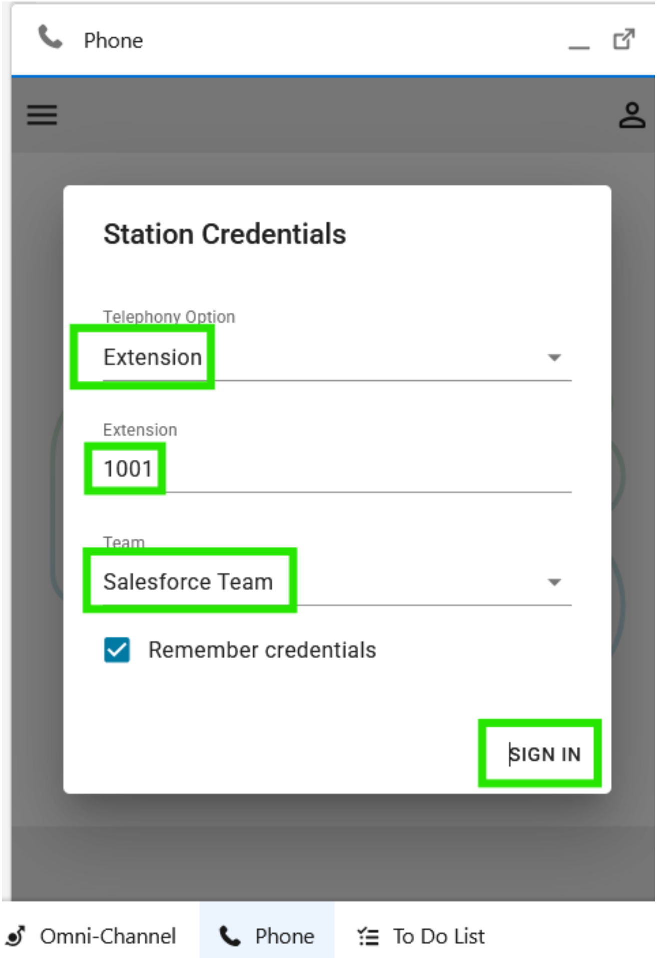


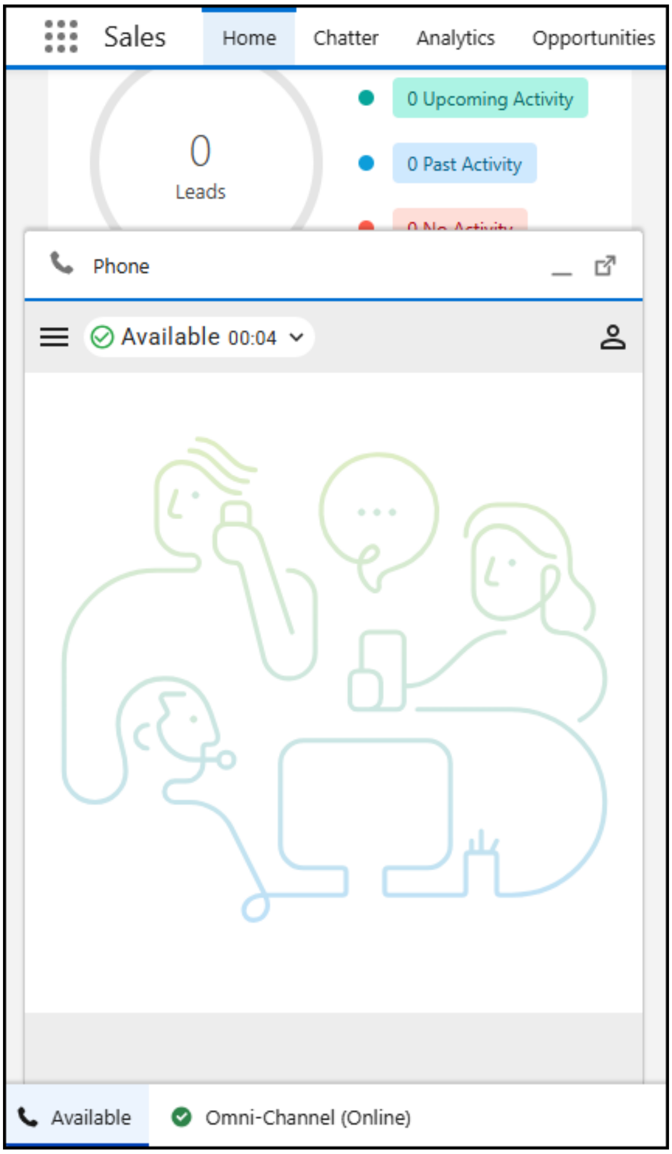

- Open the Webex Contact Center phone widget (bottom left) and login to Webex Contact Center Agent Desktop using the selected Webex Contact Center user credentials (e.g., *labuser**ID**@wx1.wbx.ai*):
- First time login into agent desktop could prompt you the OAuth2 Consent as shown in the first screenshot below. Hit **Accept** to continue




- For the phone number, select **'Extension'** and enter the extension in the format 10**NN** (where **'NN'** is your lab user number, e.g., *labuser**ID**@wx1.wbx.ai*)':
- For the team use **Salesforce Team**.


Sales
Home
Chatter
Analytics
Opportunities
Seller Home
Good morning, User. Let's get s
Phone
Sign In to Webex Contact Center.
SIGN IN
Phone
Omni-Channel


Phone
Station Credentials
Telephony Option
Extension
Extension
1001
Team
Salesforce Team
Remember credentials
SIGN IN
Omni-Channel
Phone
To Do List




- Congratulations! You have complete the task.

# 1.3 Task 1 - Integrate Webex Contact Center with Salesforce Using the New CRM Connector

Please use the following credentials to complete the tasks:

| | |
|---|---|
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## 1.3.1 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 alteast once in 45 days.

## 1.3.2 Section 1 - Configure Call Center

**Attention**

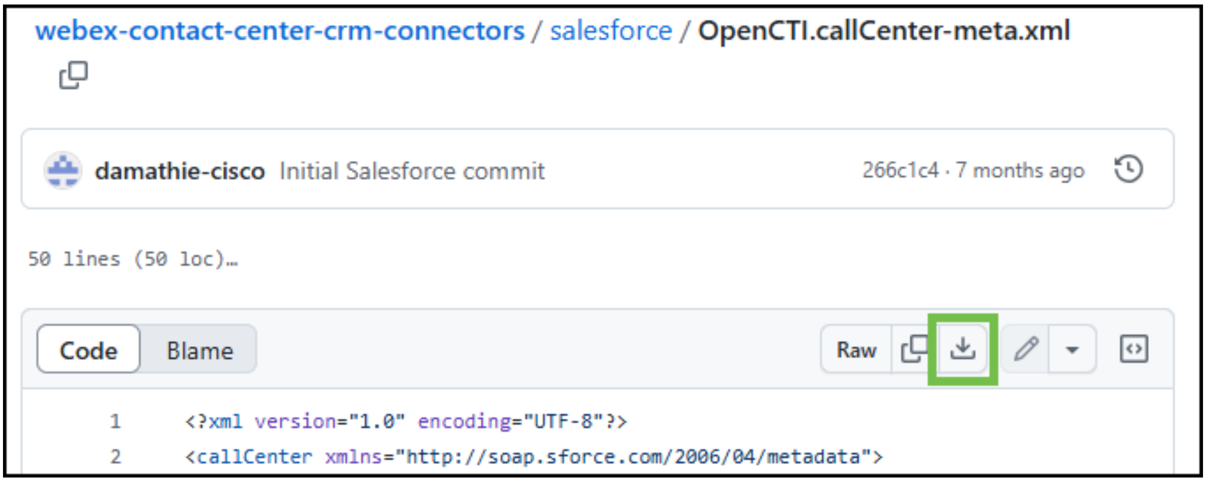
Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

- Navigate to Salesforce portal and log in with the credentials provided.

**Note**

The package for the WxCC V2 Salesforce connector is already pre-installed. In production environments, it will need to be installed manually and can be retrieved from this link.

- Visit the Github repository to download the latest call center definition file - https://github.com/webex/webex-contact-center-crm-connectors/blob/main/salesforce/OpenCTI.callCenter-meta.xml (click **'Download raw file button'**).

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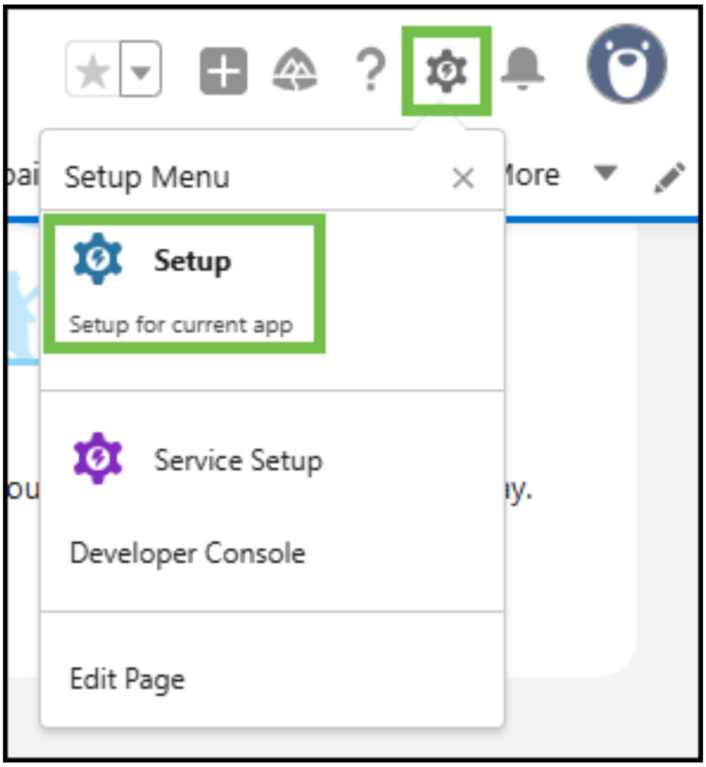


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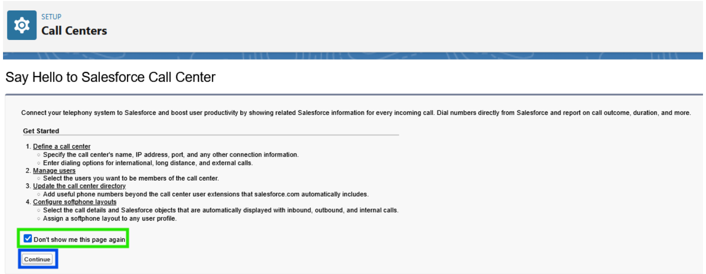
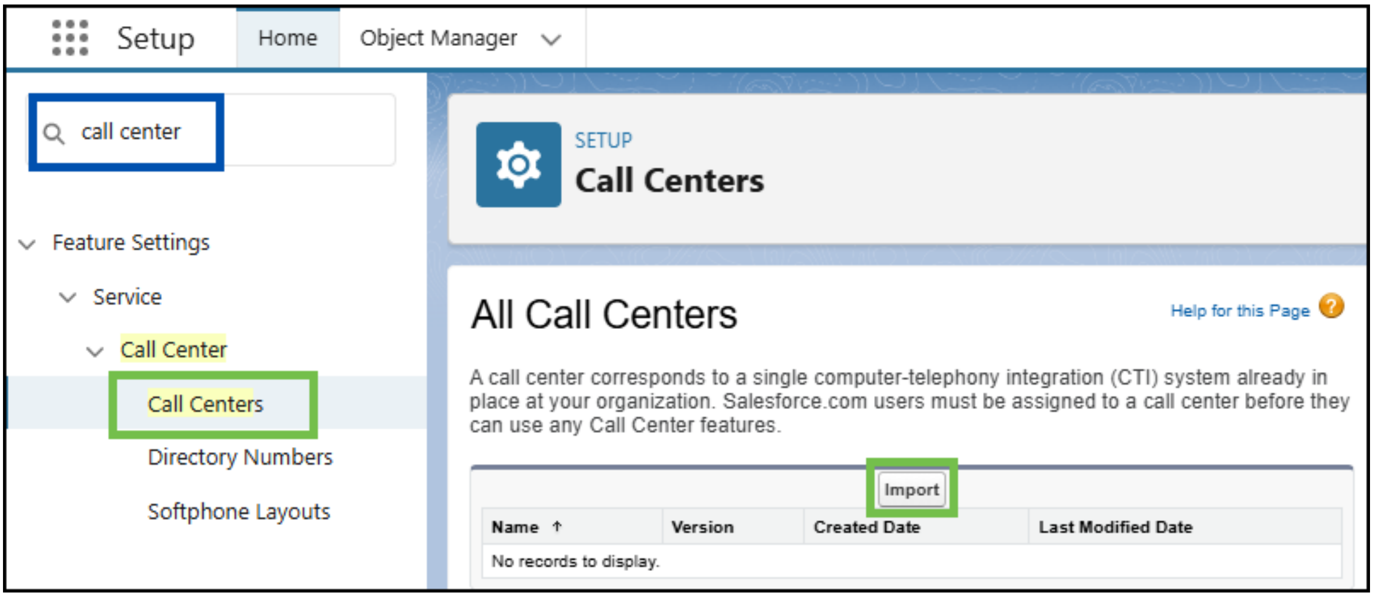
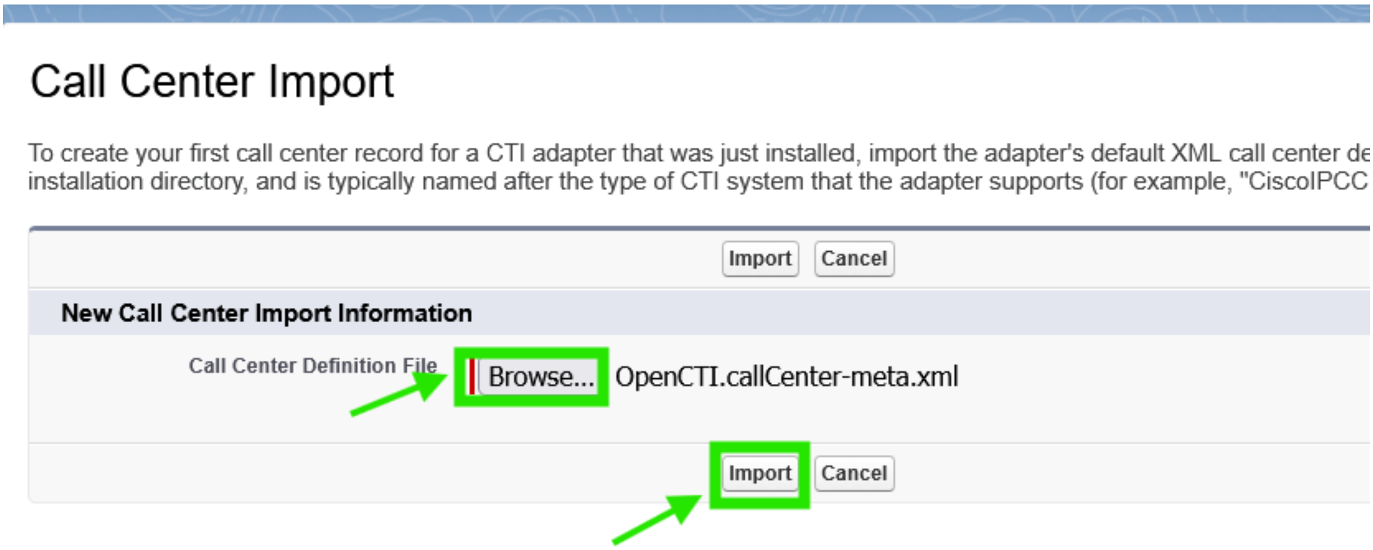



- Click **'Import'**, select **'Browse'** and choose the call center definition file (downloaded earlier).
- Click **'Import'** again to save the added file.

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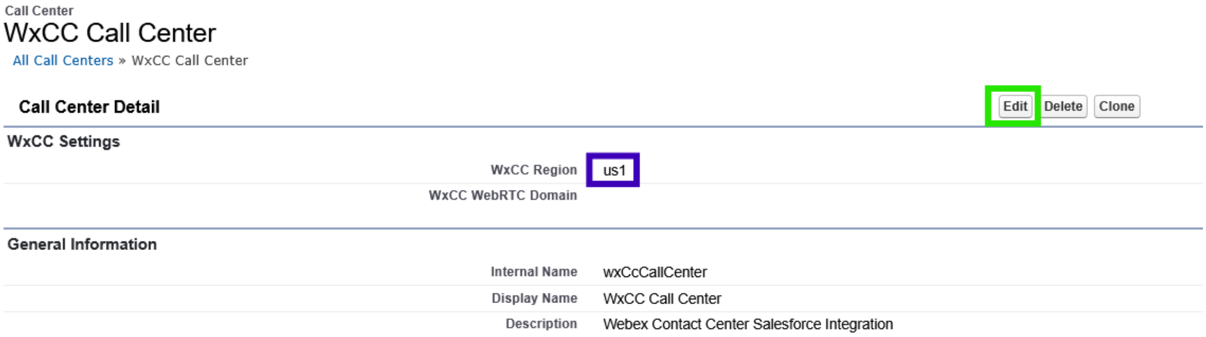


- Click **'Save'**.
- Add users to the Call Center:
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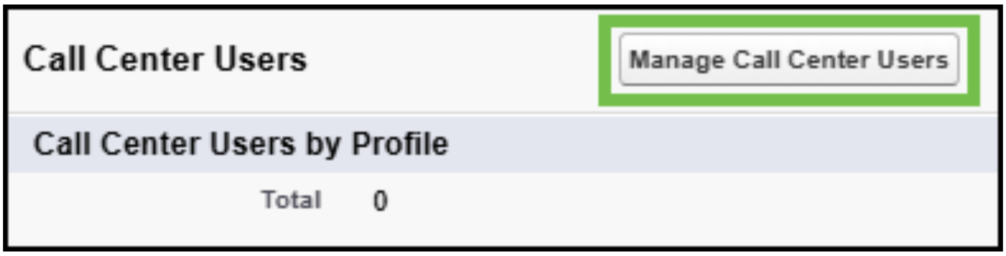
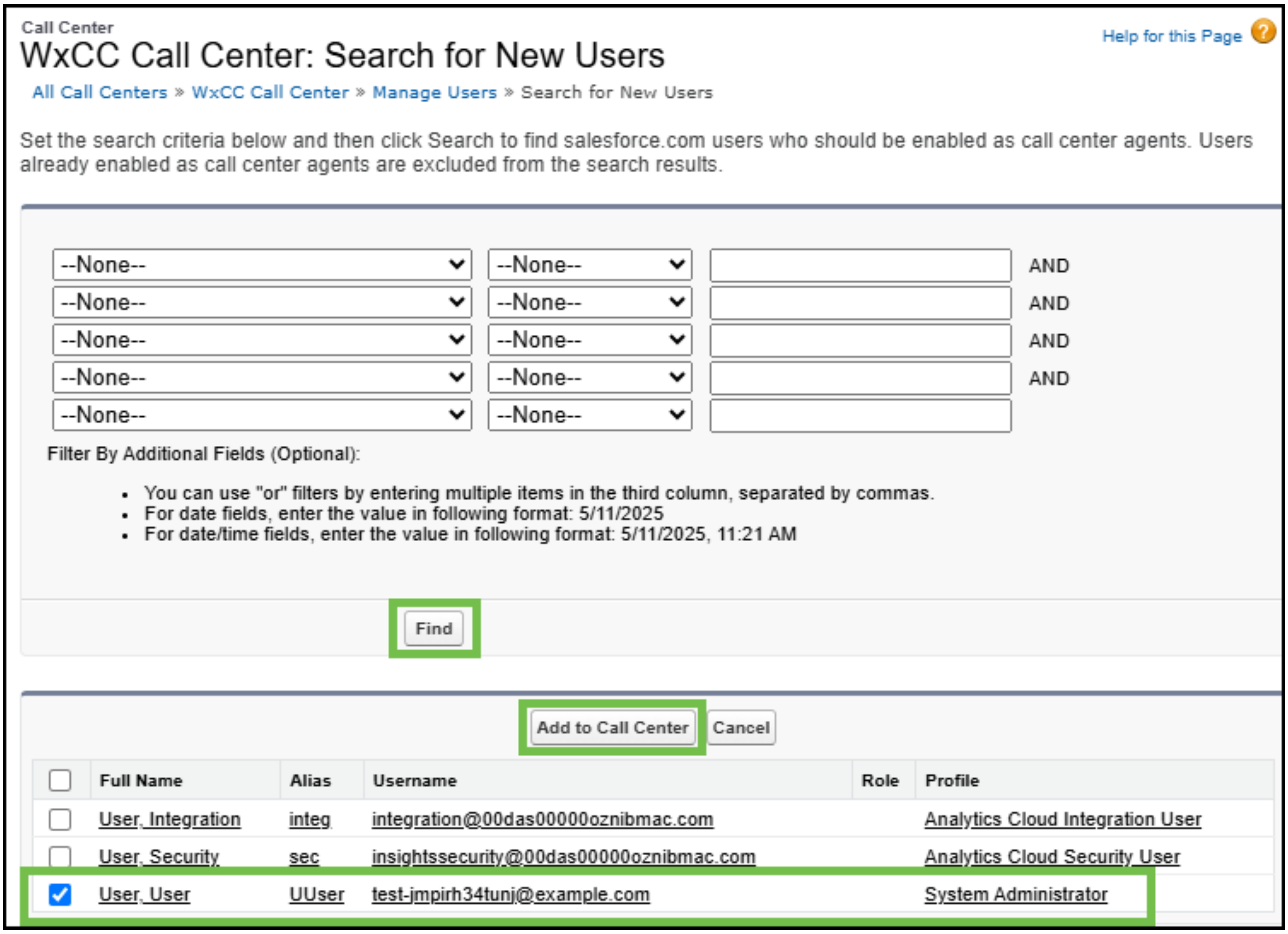
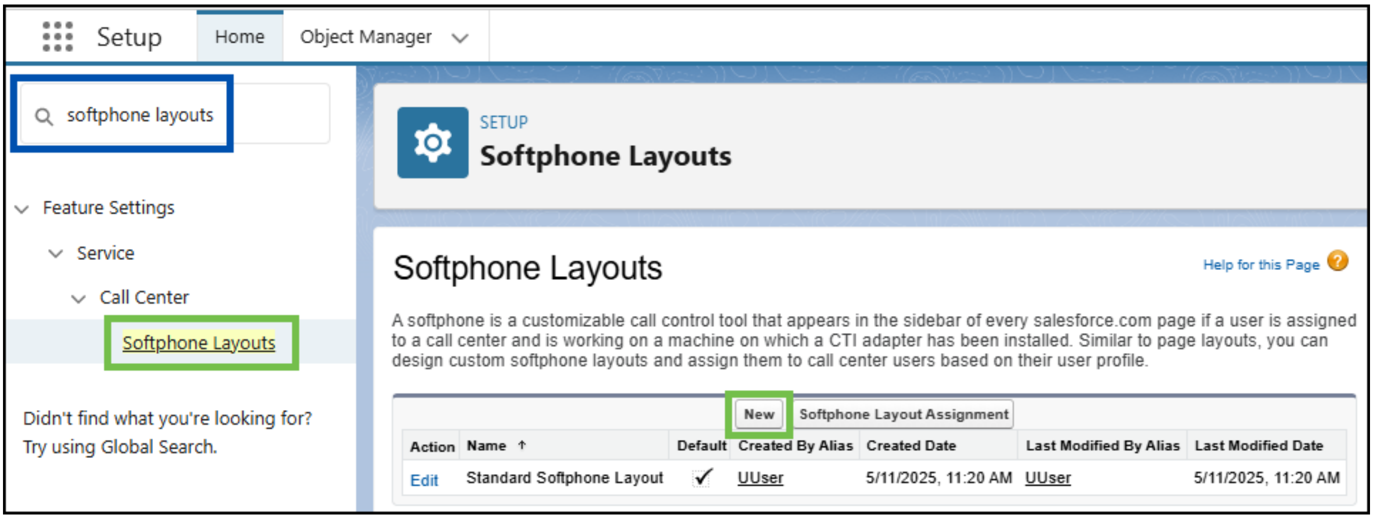



### 1.3.3 Section 2 - Configure Softphone Layout

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

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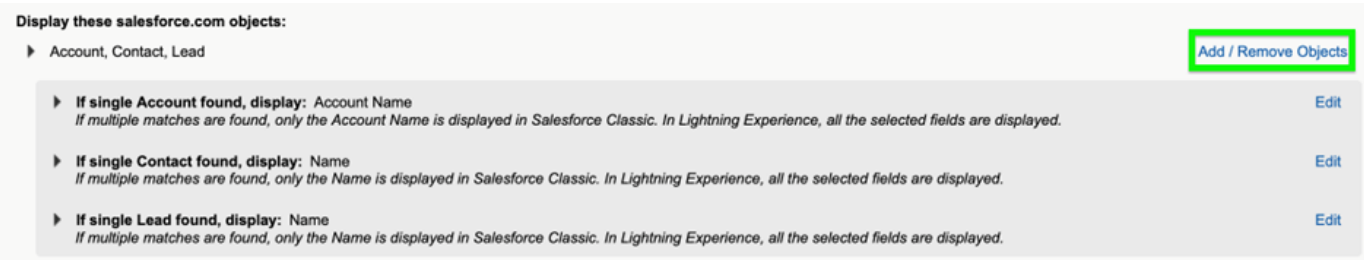
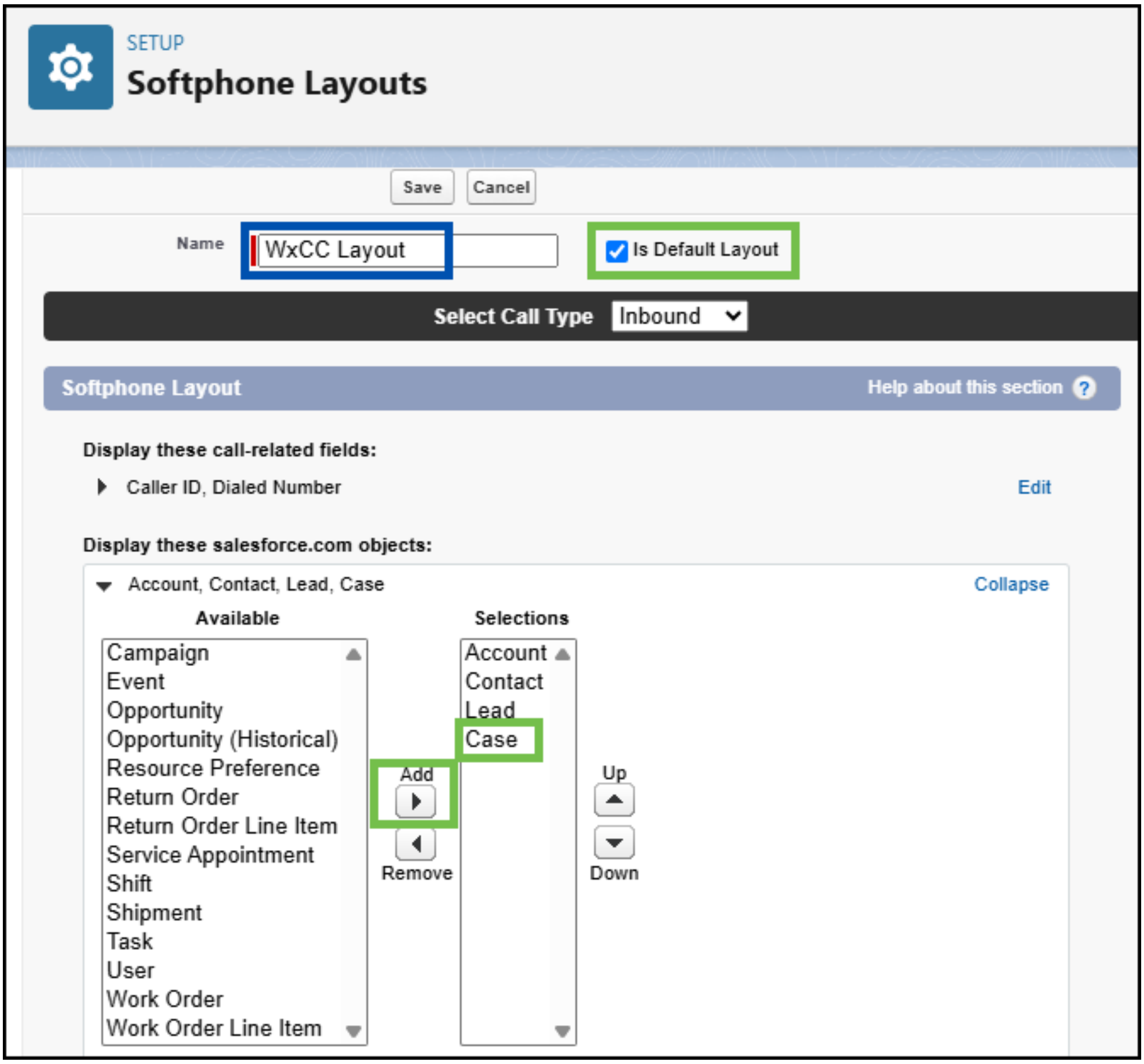
- Under **'Display these salesforce.com objects'**, click on **'Add/Remove Objects'** and add 'Case'.



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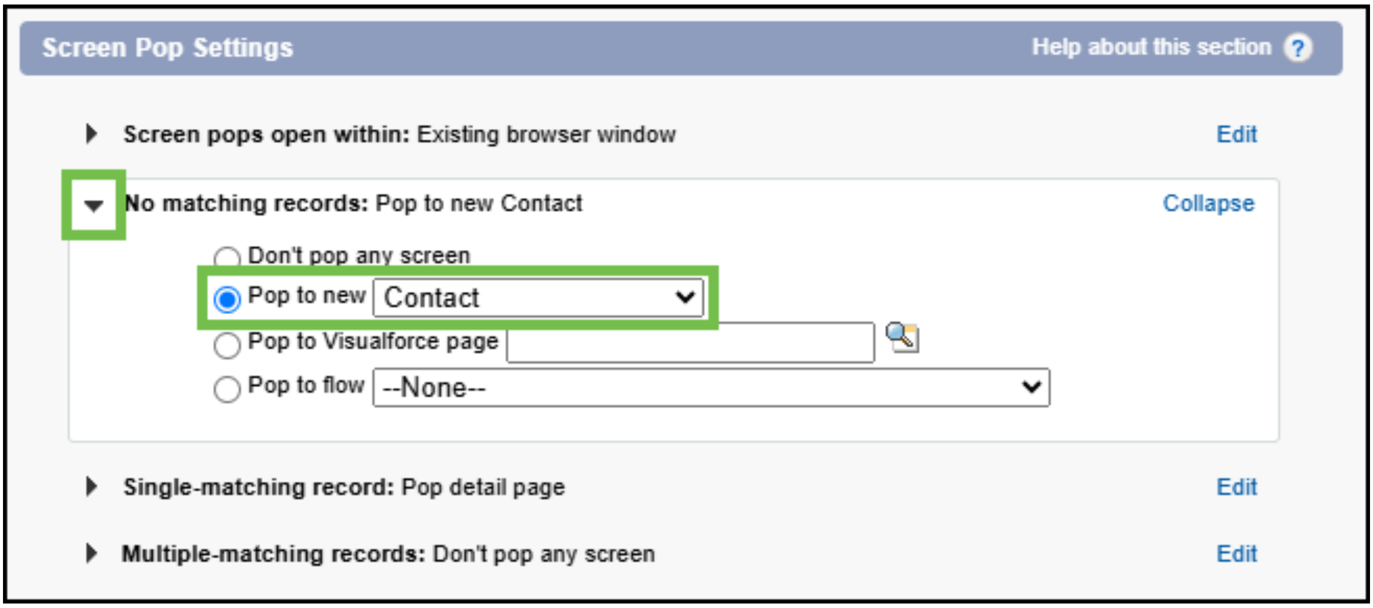

> **Note**
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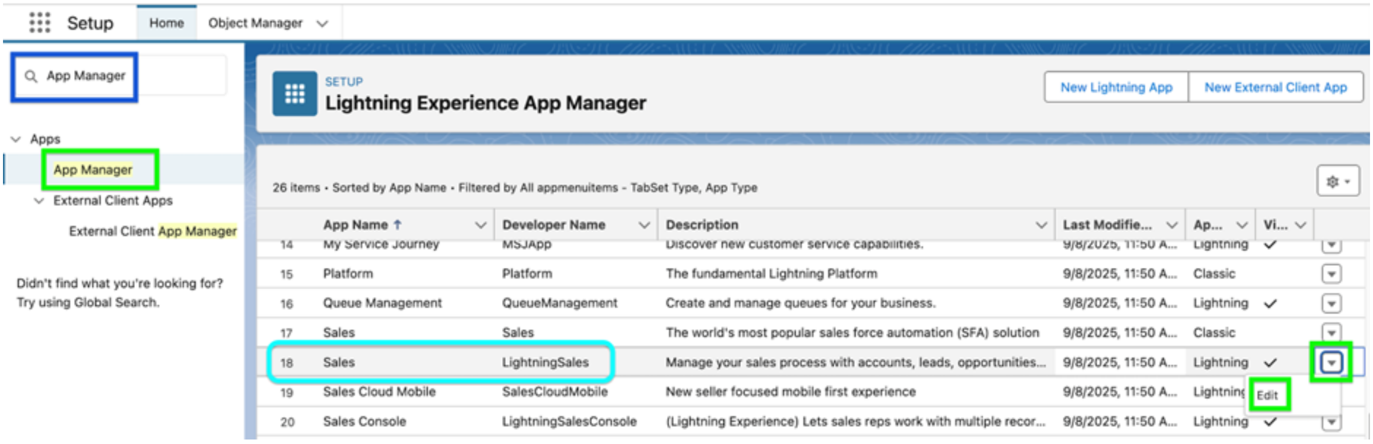
> Other Salesforce objects can be selected here as well. **'Contact'** is used as an example in this exercise.

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

### 1.3.4 Section 3 - 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 18; **'LightningSales'** developer) click **'Edit'** on the right-hand side.




- In the next window, select **'Utility Items (Desktop Only)'**.
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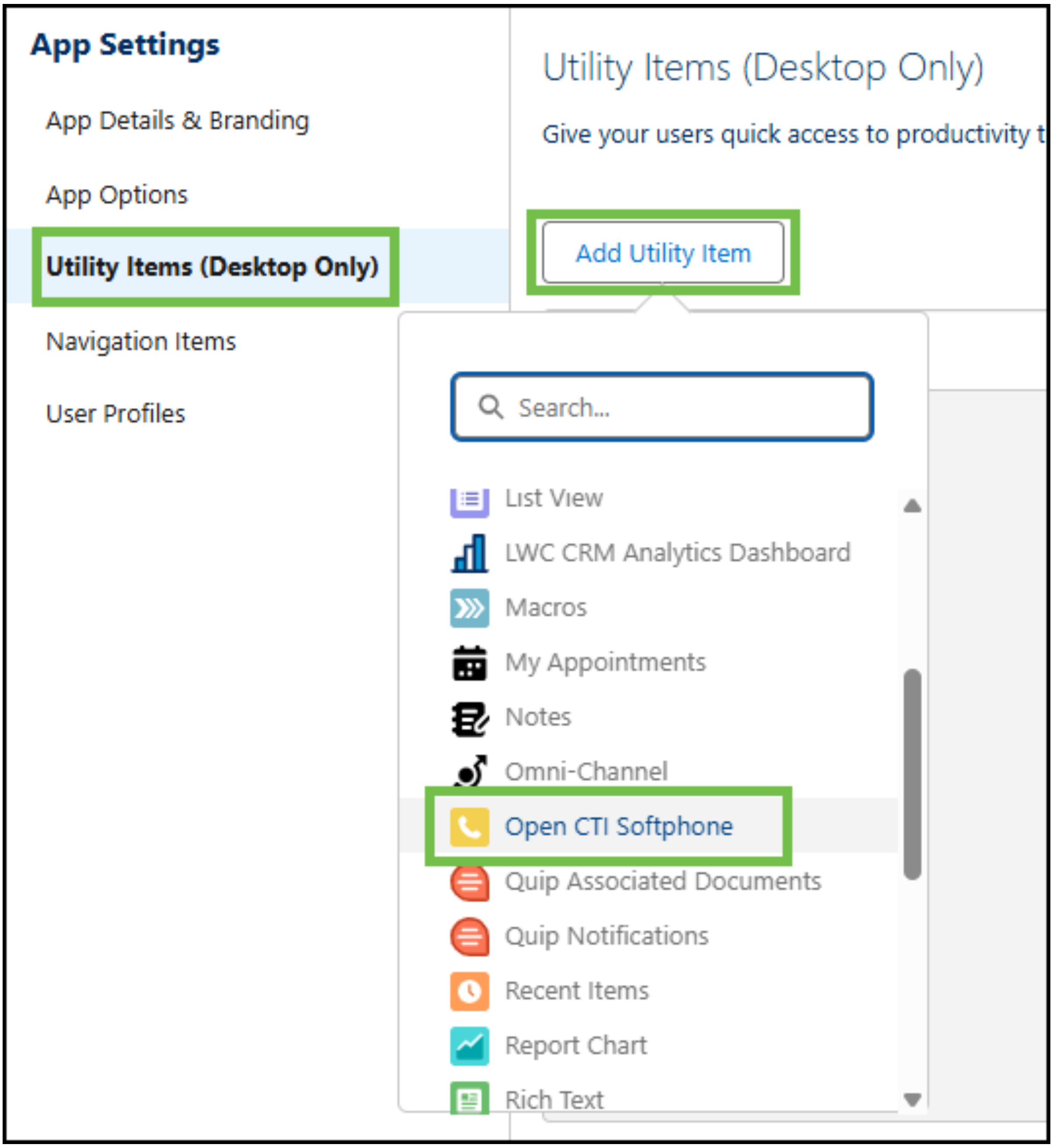


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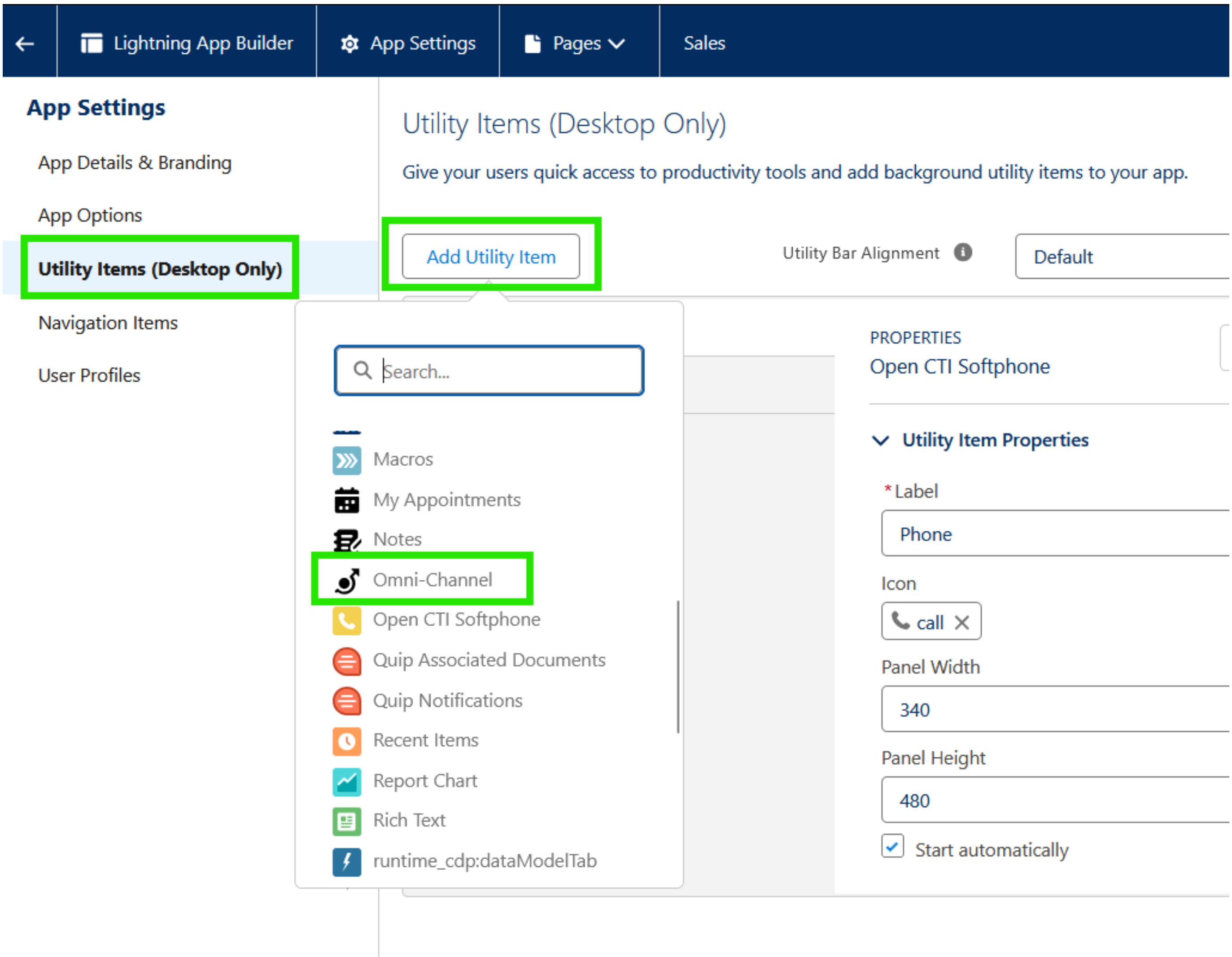


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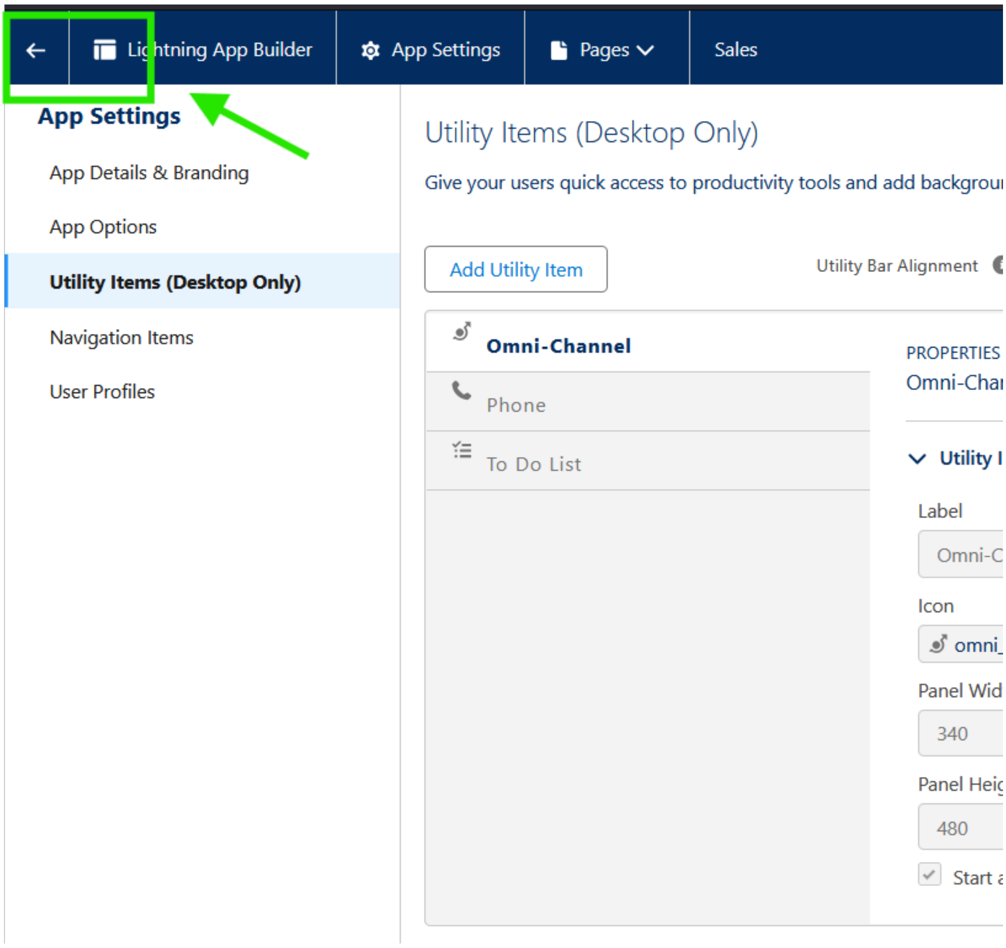


### 1.3.5 Section 4 - Testing

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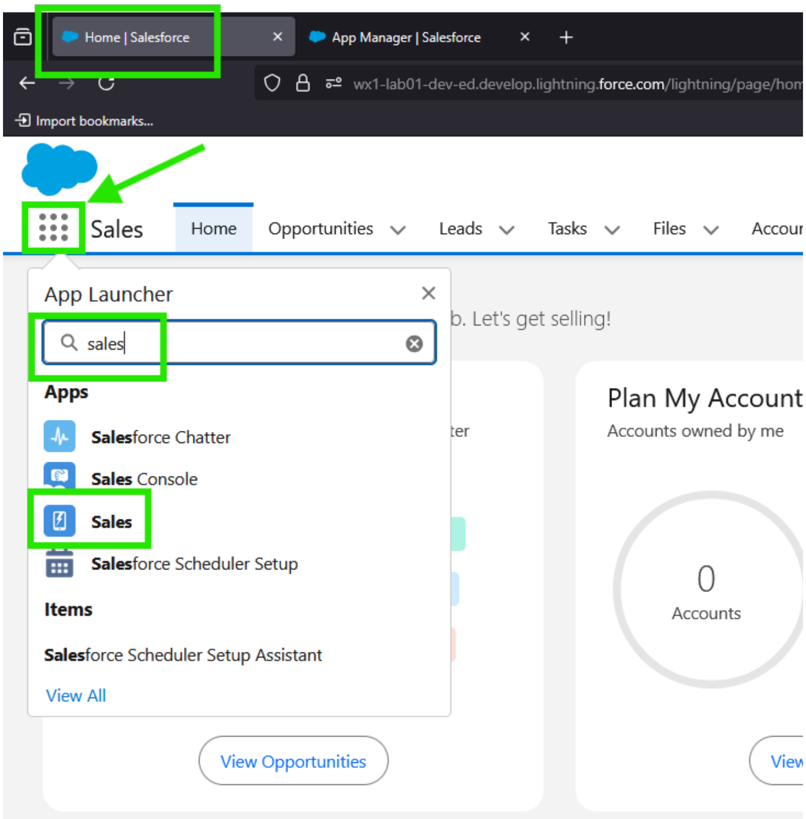
> Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

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

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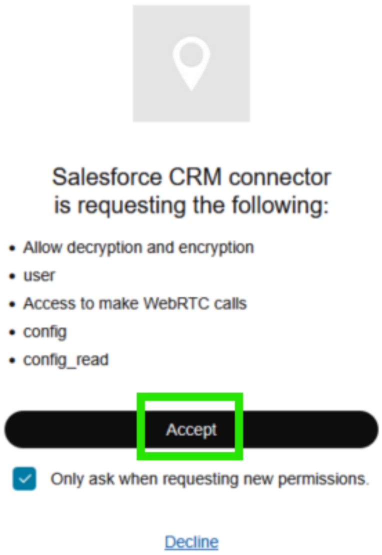


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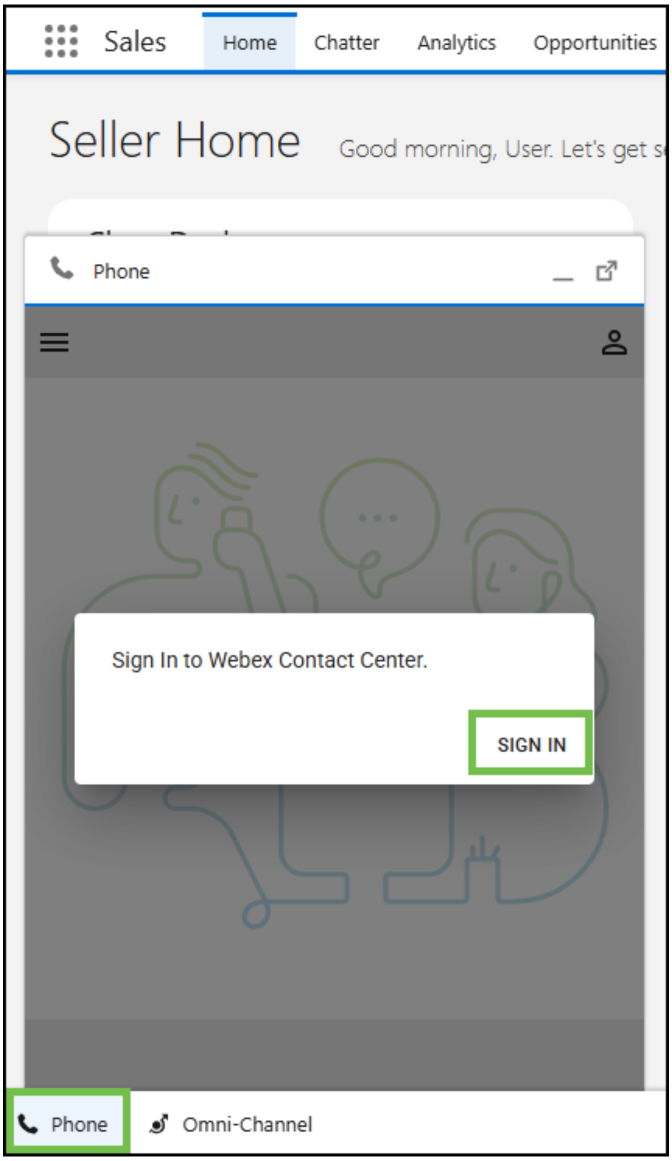
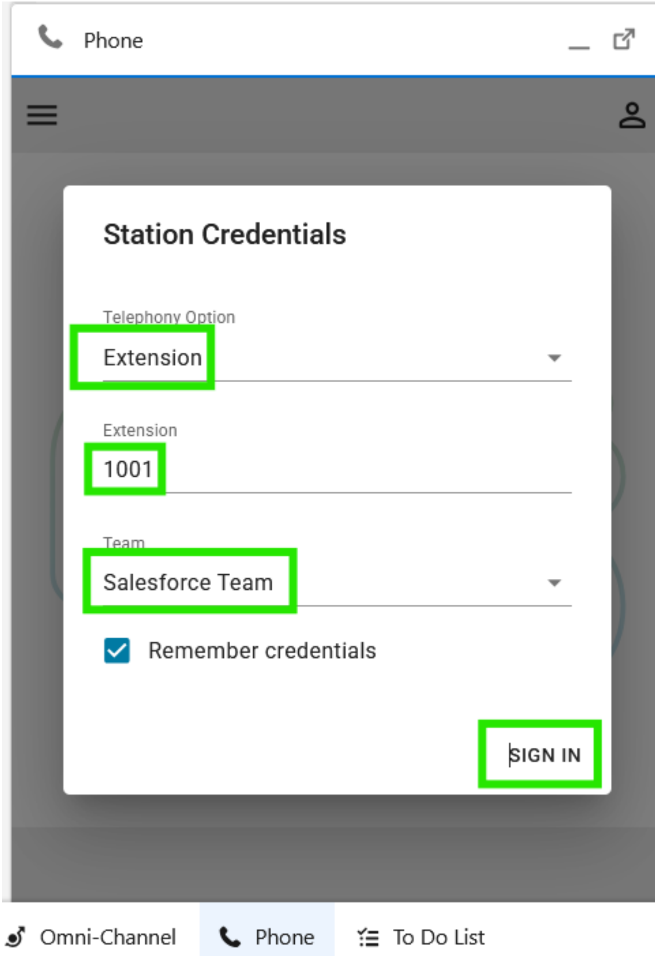
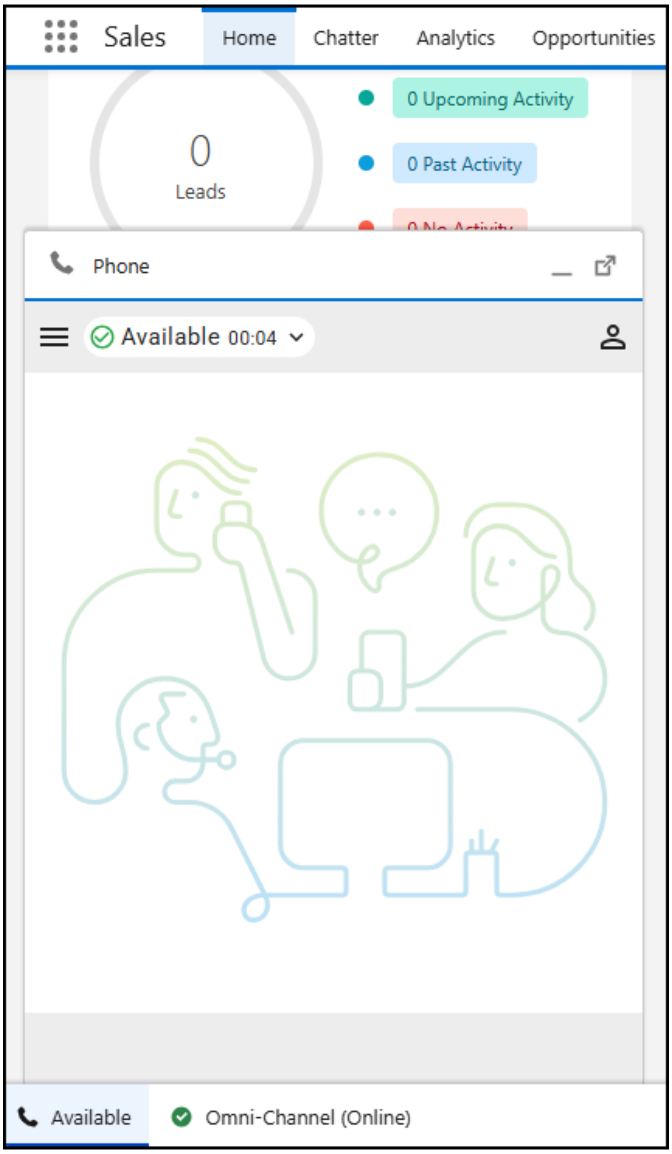

Sales
Home
Chatter
Analytics
Opportunities
Seller Home
Good morning, User. Let's get s
Phone
Sign In to Webex Contact Center.
SIGN IN
Phone
Omni-Channel


Phone
Station Credentials
Telephony Option
Extension
Extension
1001
Team
Salesforce Team
Remember credentials
SIGN IN
Omni-Channel
Phone
To Do List




- Congratulations! You have complete the task.

## 1.4 Task 2 - Integrate Salesforce Connector with WebRTC

Please use the following credentials to complete the tasks:

| | |
|---|---|
| `Control Hub` | https://admin.webex.com |
| `Salesforce` | https://login.salesforce.com/ |
| `WxCC Username` | labuser**ID**@wx1.wbx.ai 📋 *(where **ID** is your selected pod number (01 through 30); i.e. labuser**02**@wx1.wbx.ai if selected pod is 2)* |
| `WxCC Password` | webexONE1! 📋 |
| `Salesforce Username` | labuser**ID**@wx1.wbx.ai 📋 *(where **ID** is your selected pod number (01 through 30); i.e. labuser**02**@wx1.wbx.ai if selected pod is 2)* |
| `Salesforce Password` | webexONE1! 📋 |

**Task Objectives**

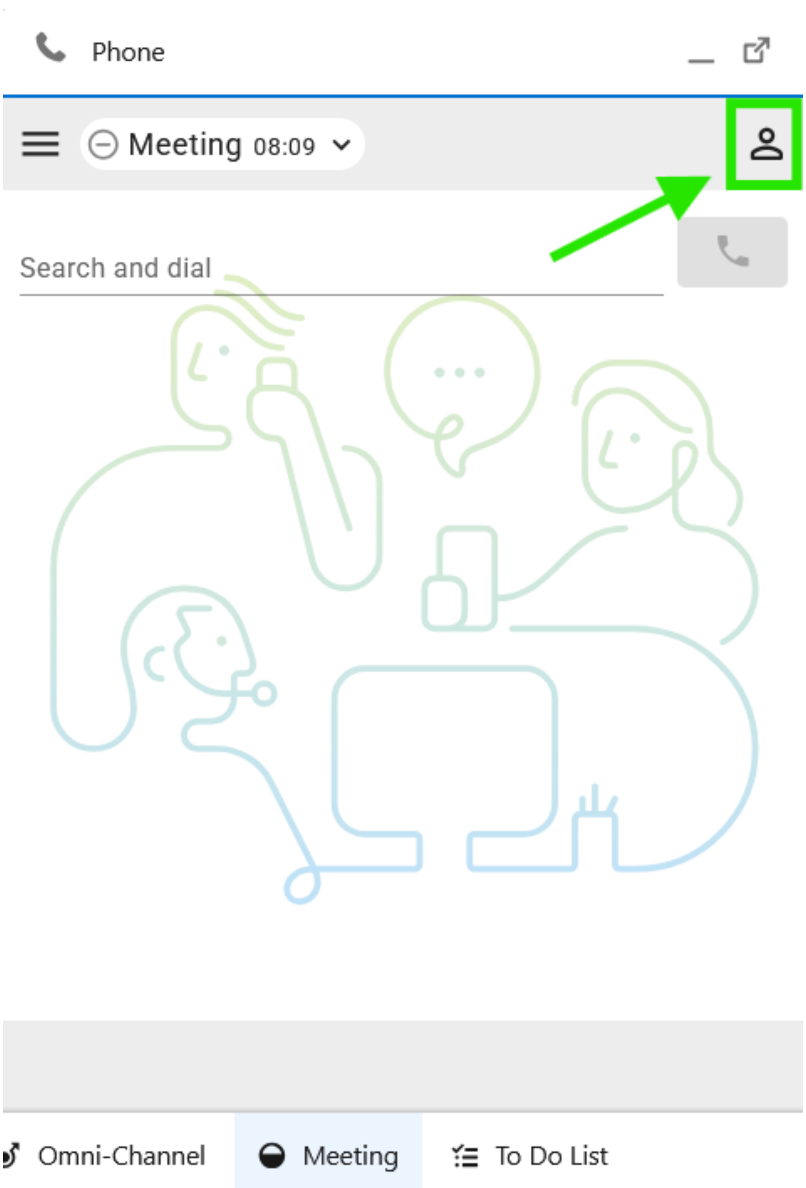
- Login with WebRTC on Salesforce.
- Troubleshoot and configure the steps needed to enable WebRTC login

### 1.4.1 Section 1 - Using WebRTC Option

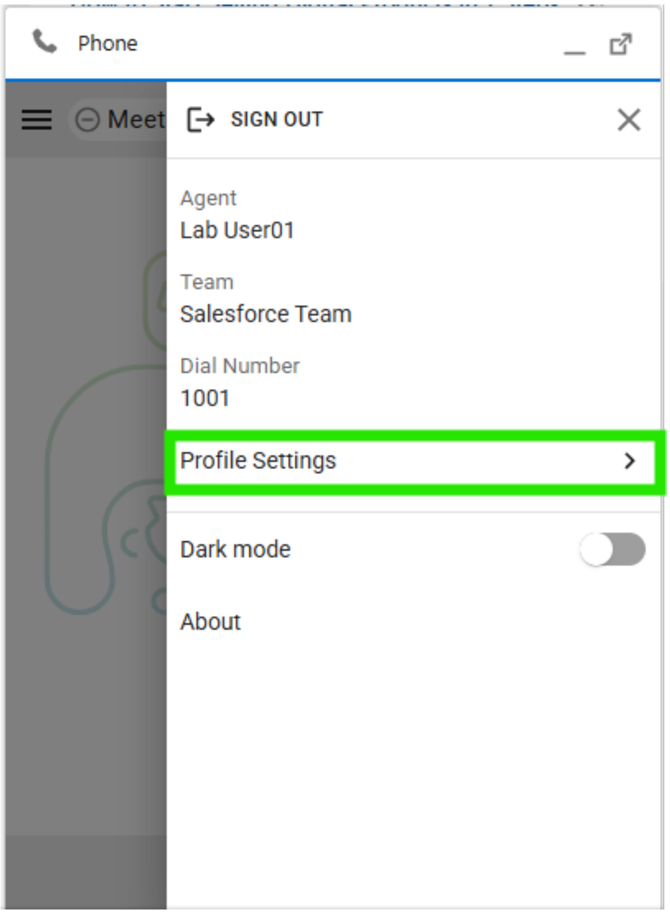
**Attention**

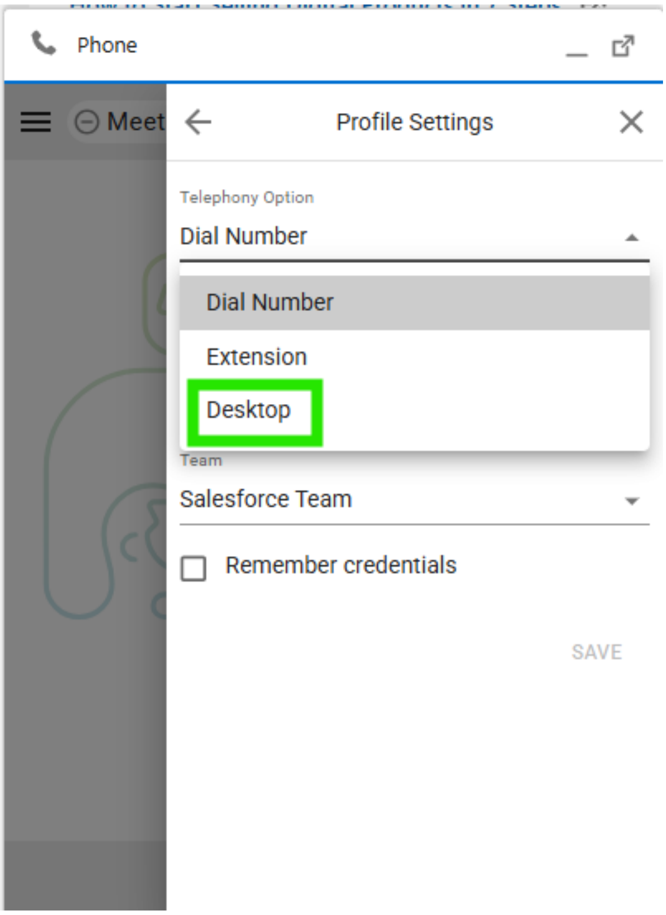
Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

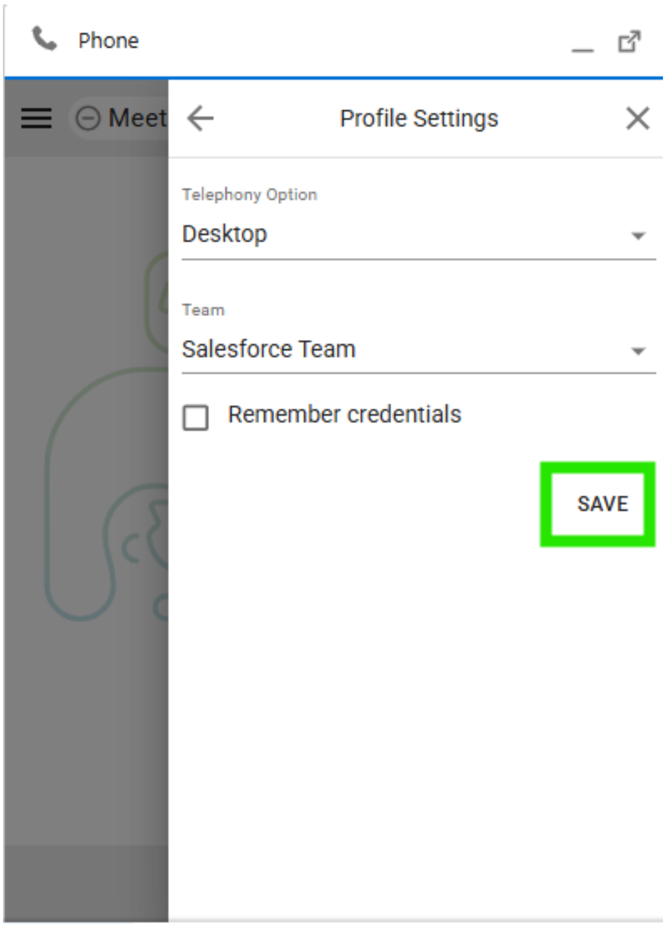
- Navigate to Agent Desktop and select the Avatar on the top right



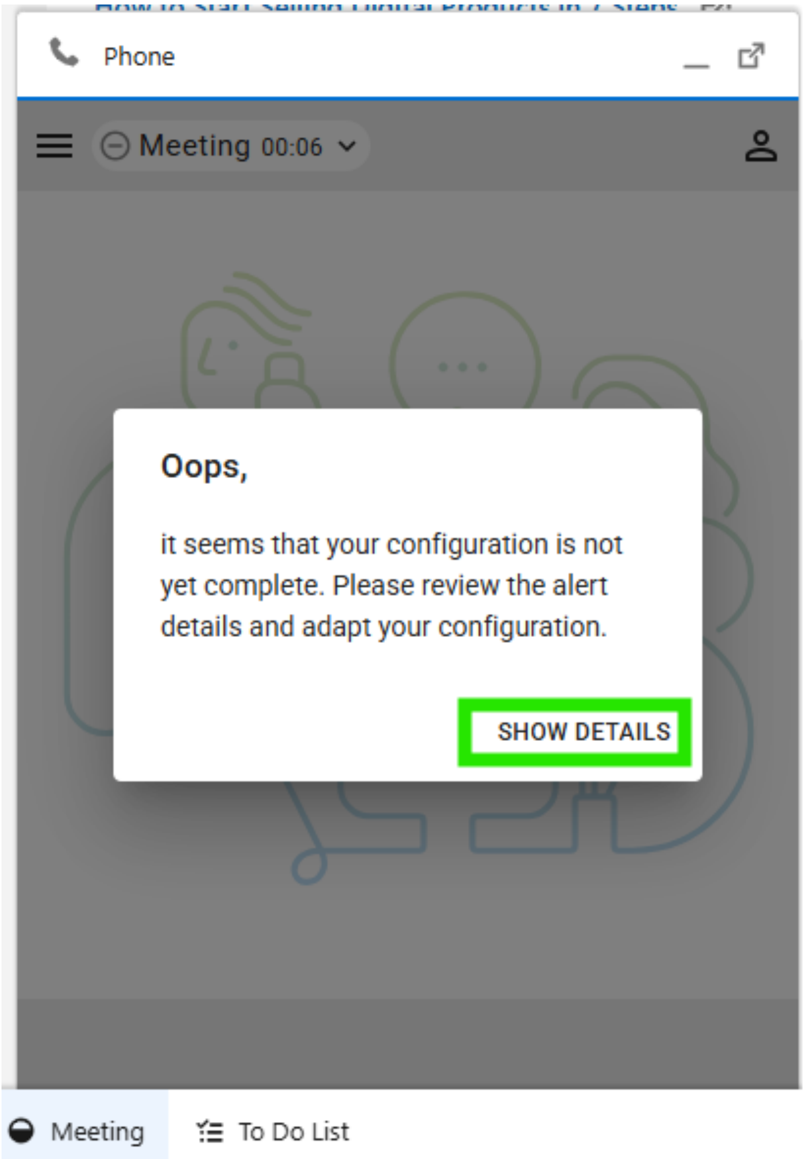

- Navigate to **'Profile Settings > Desktop > Save'** (or type *Call Centers* in the search bar above the left-hand menu).

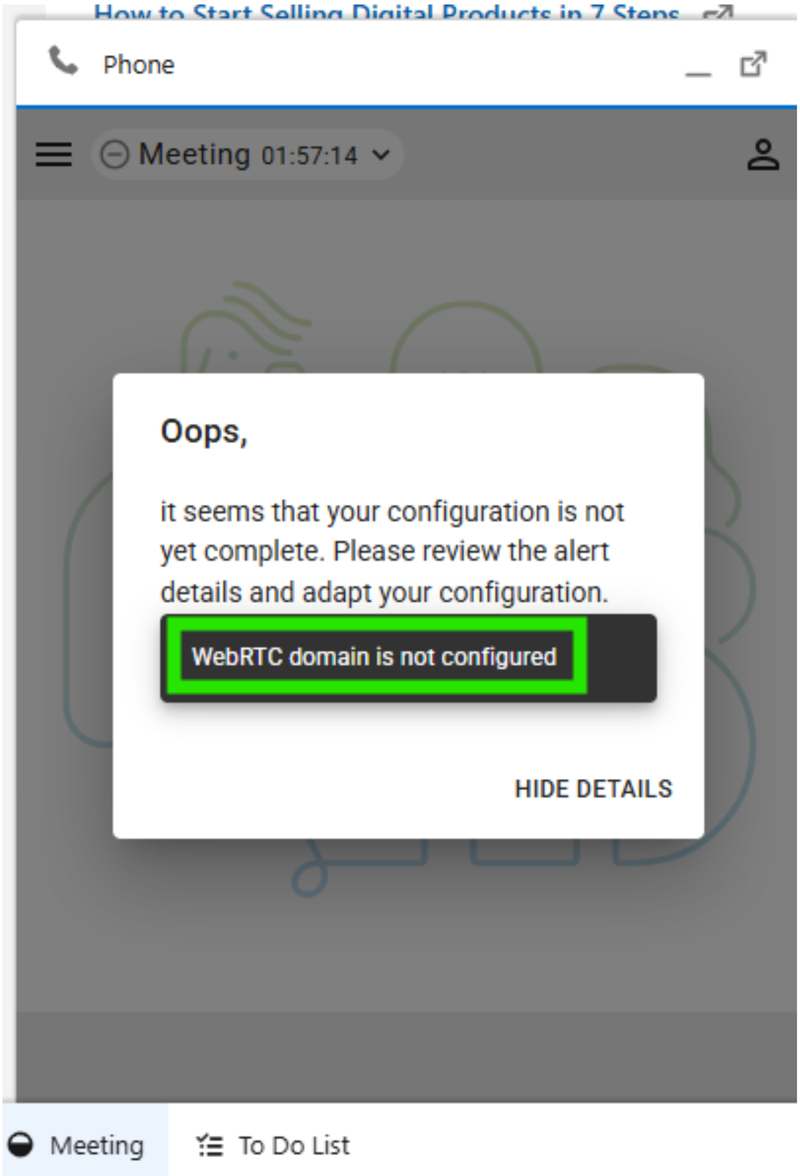

Phone
Meet
SIGN OUT
Agent
Lab User01
Team
Salesforce Team
Dial Number
1001
Profile Settings
Dark mode
About


Phone
Meet
Profile Settings
Telephony Option
Dial Number
Dial Number
Extension
Desktop
Team
Salesforce Team
Remember credentials
SAVE


Phone
Meet
Profile Settings
Telephony Option
Desktop
Team
Salesforce Team
Remember credentials
SAVE

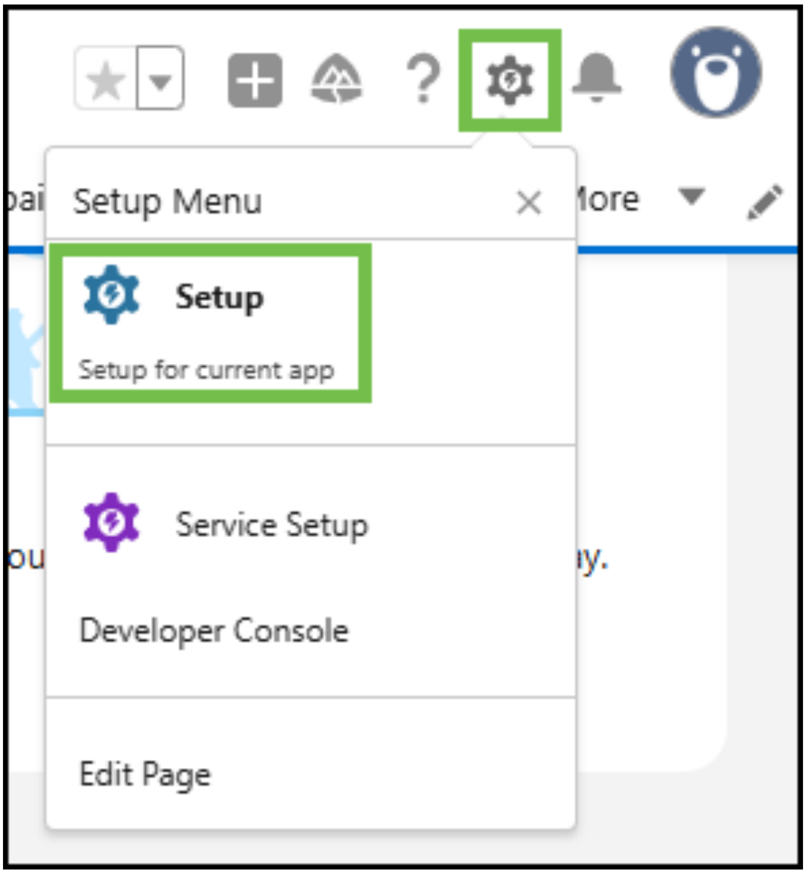
- Once the Save button is hit, the error message pops up "WebRTC domain is not configured"


Phone
Meeting 00:06
Oops,
it seems that your configuration is not yet complete. Please review the alert details and adapt your configuration.
SHOW DETAILS
Meeting
To Do List

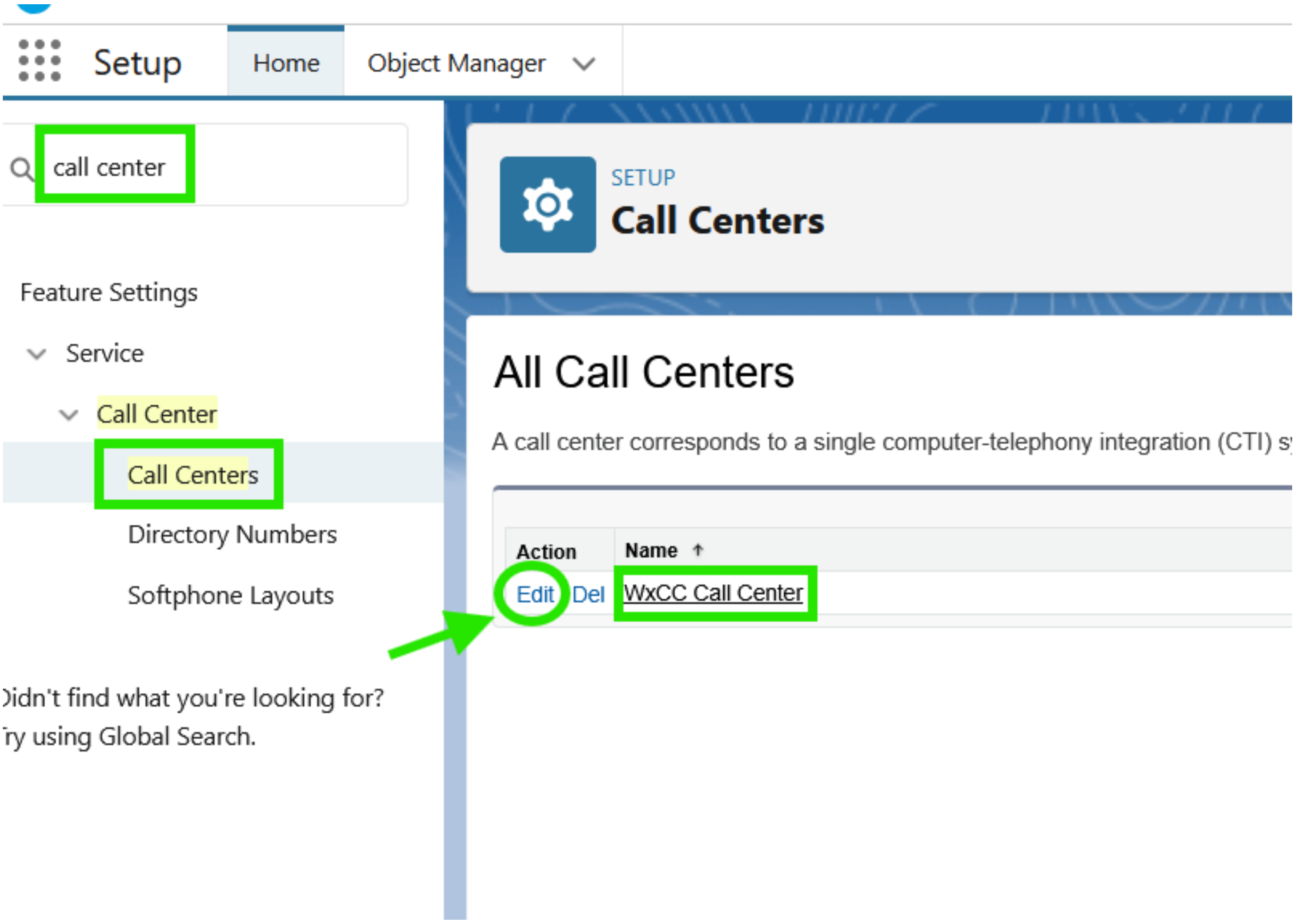



## 1.4.2 Section 2 - Steps to Correct and Enable WebRTC Login

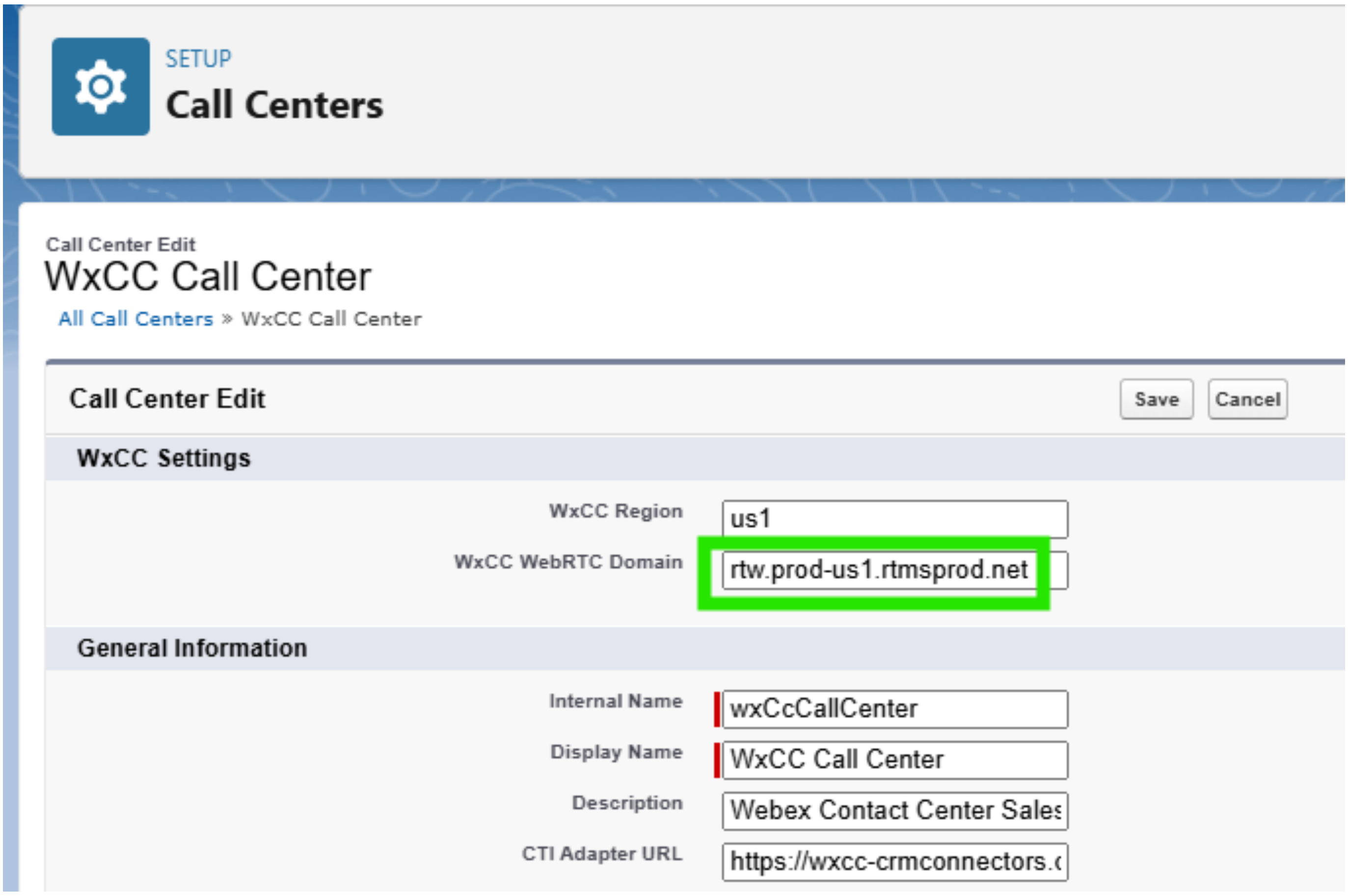
- In order to mitigate this issue, in Salesforce, navigate to **'Setup'** by clicking the gear icon in the top-right corner and selecting **'Setup'**.




- 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`



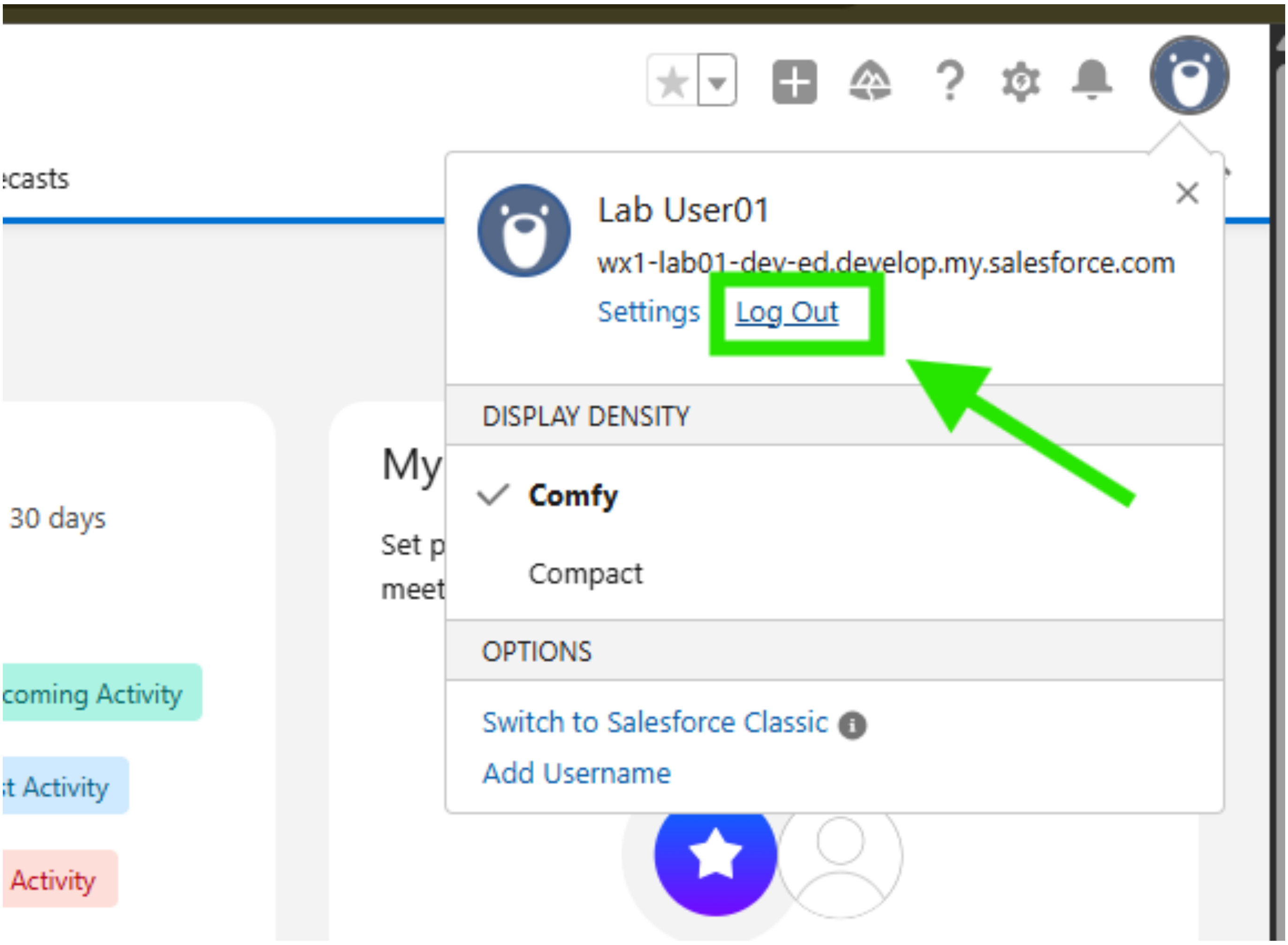

• Enter **'rtw.prod-us1.rtmsprod.net'** in the **'WxCC WebRTC Domain'**




**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

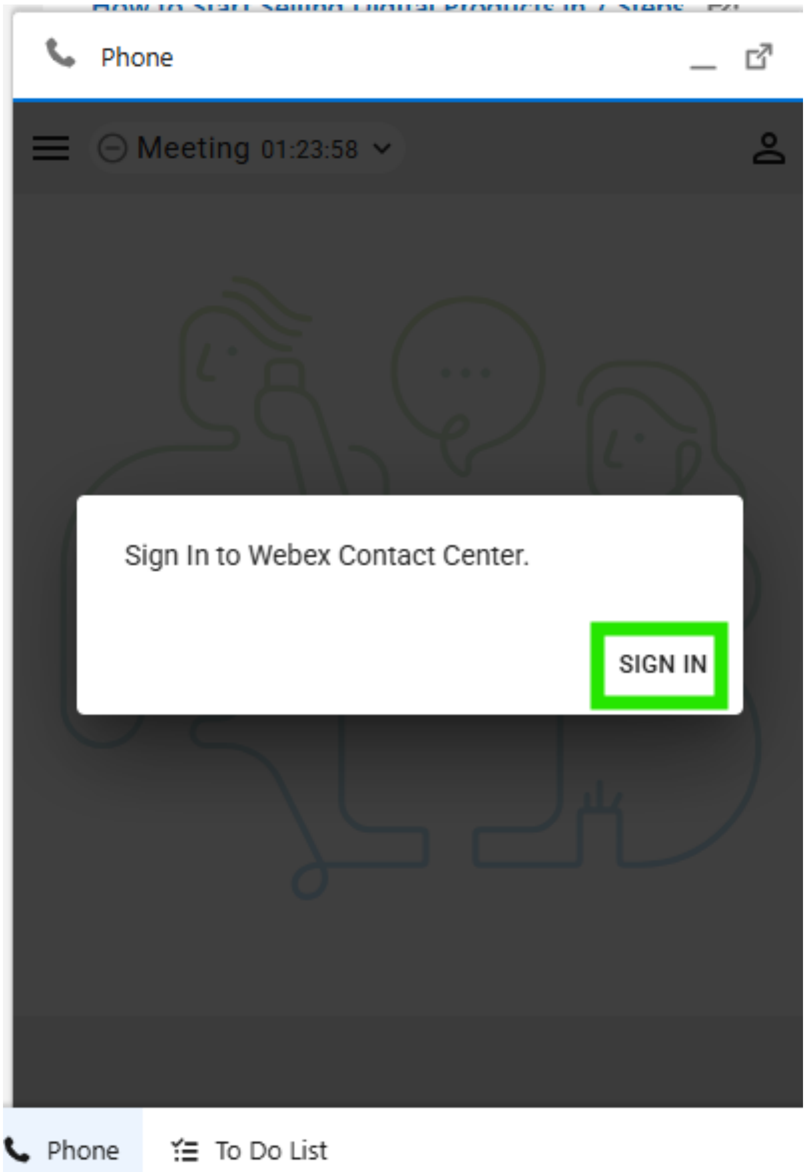
- Click **'Save'**.
- Logout and log back in to salesforce.

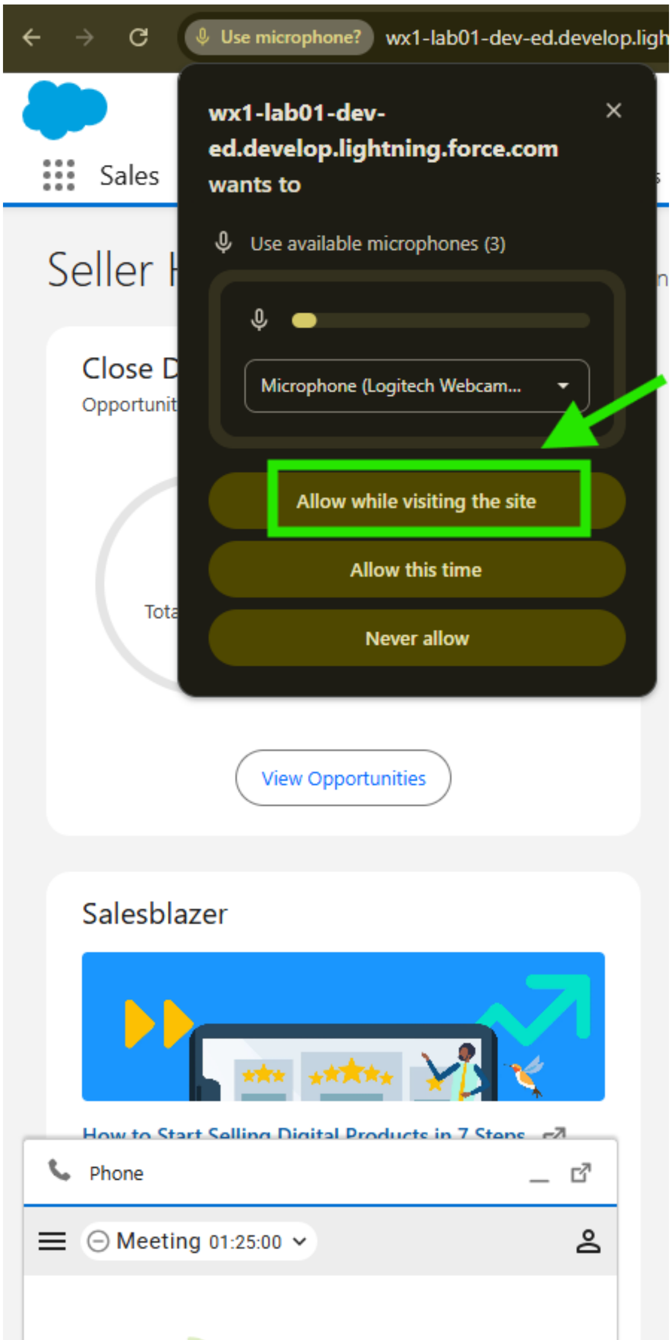



## 1.4.3 Section 3 - Testing

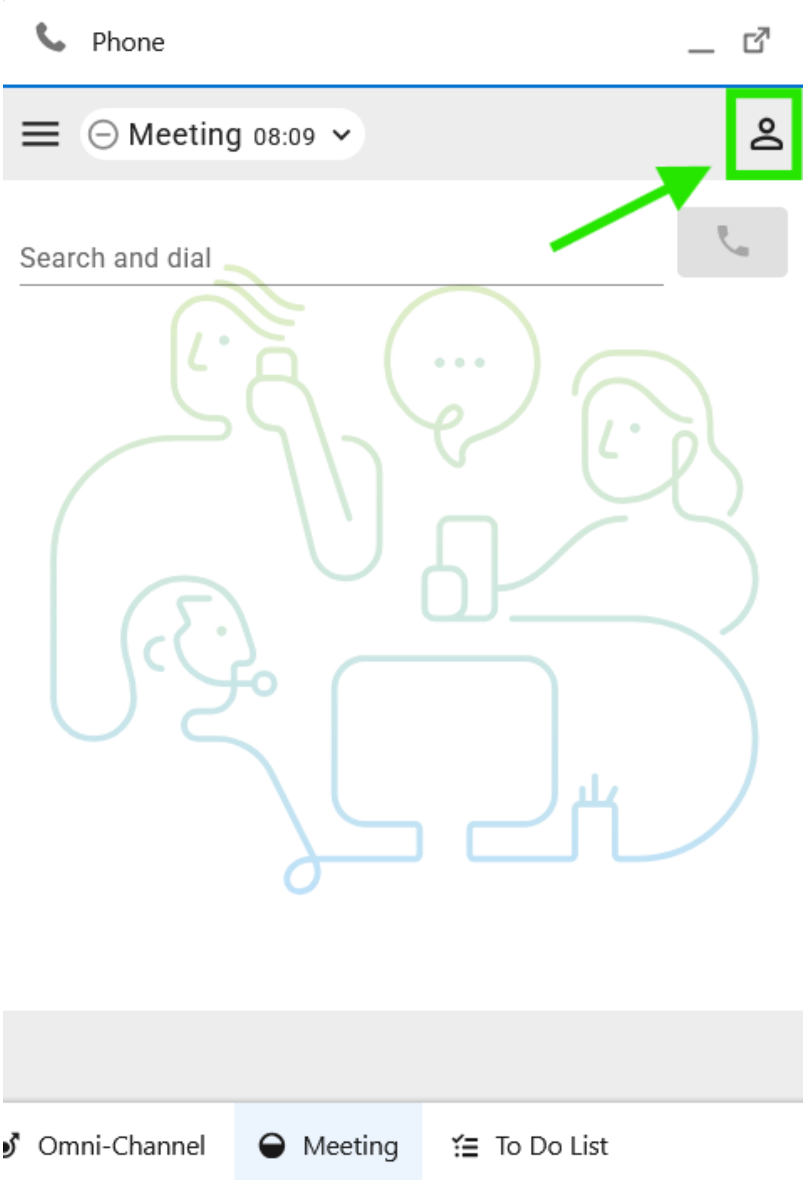
> **Attention**
>
> Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

- 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.

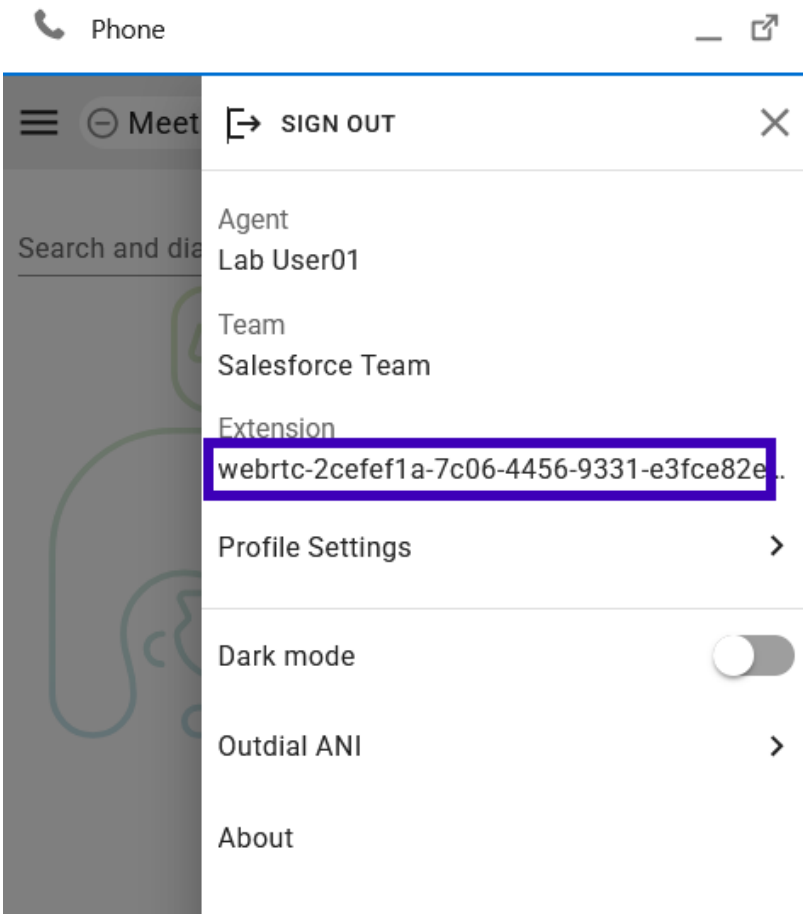

Phone
Meeting 01:23:58
Sign In to Webex Contact Center.
SIGN IN
Phone
To Do List




• 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 Task 3 - 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/ |
| `WxCC Username` | labuser**ID**@wx1.wbx.ai 📋 *(where **ID** is your selected pod number (01 through 30); i.e. labuser**02**@wx1.wbx.ai if selected pod is 2)* |
| `WxCC Password` | webexONE1! 📋 |
| `Salesforce Username` | labuser**ID**@wx1.wbx.ai 📋 *(where **ID** is your selected pod number (01 through 30); i.e. labuser**02**@wx1.wbx.ai if selected pod is 2)* |
| `Salesforce Password` | webexONE1! 📋 |

**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.

## 1.5.1 Section 1 - Create Presence Statuses

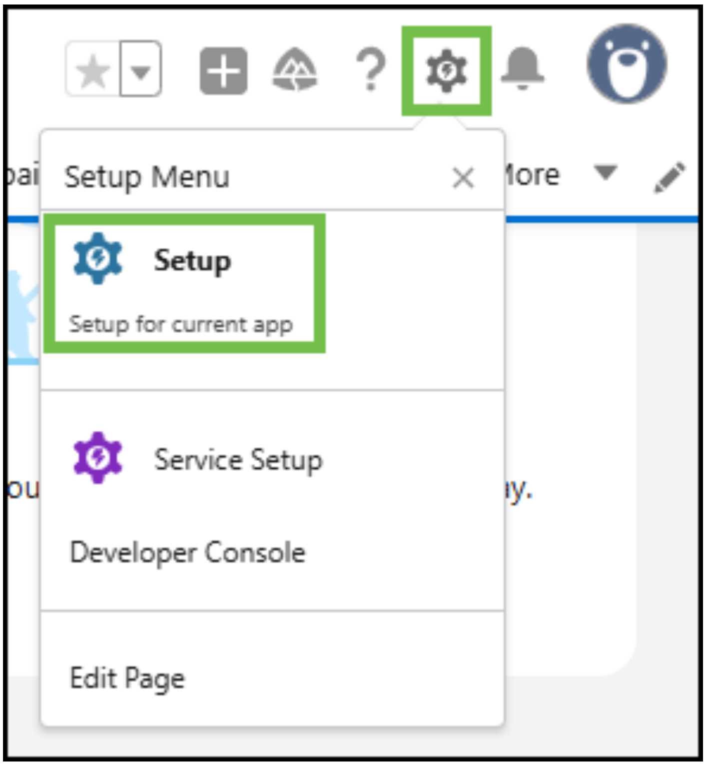
**Attention**

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

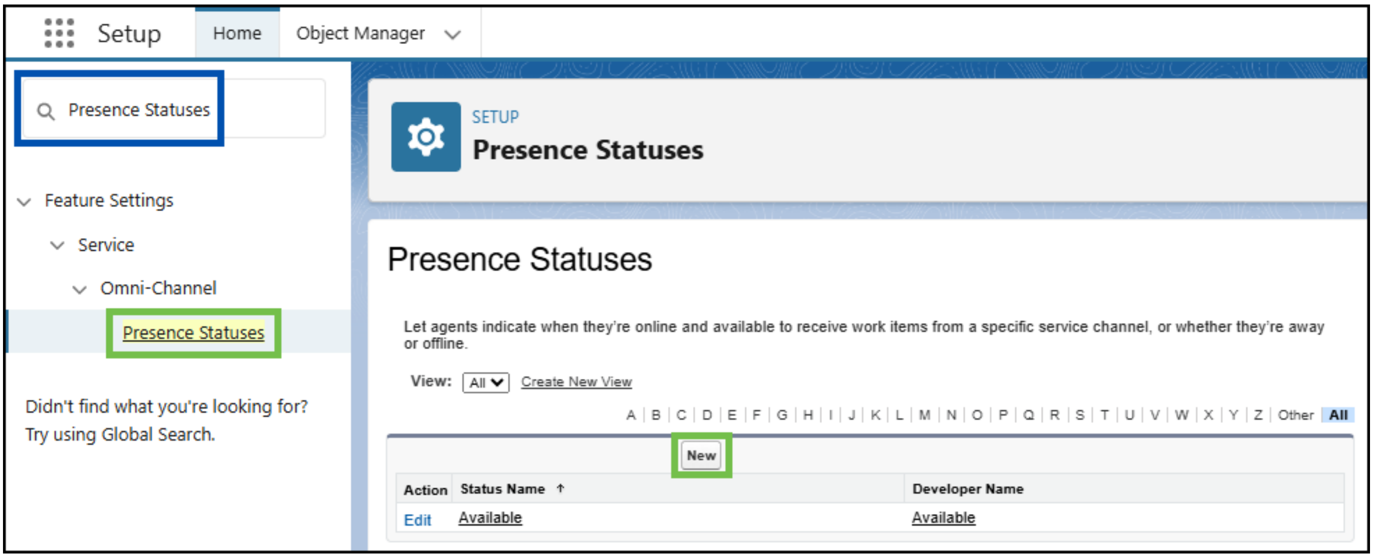
**Note**

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.

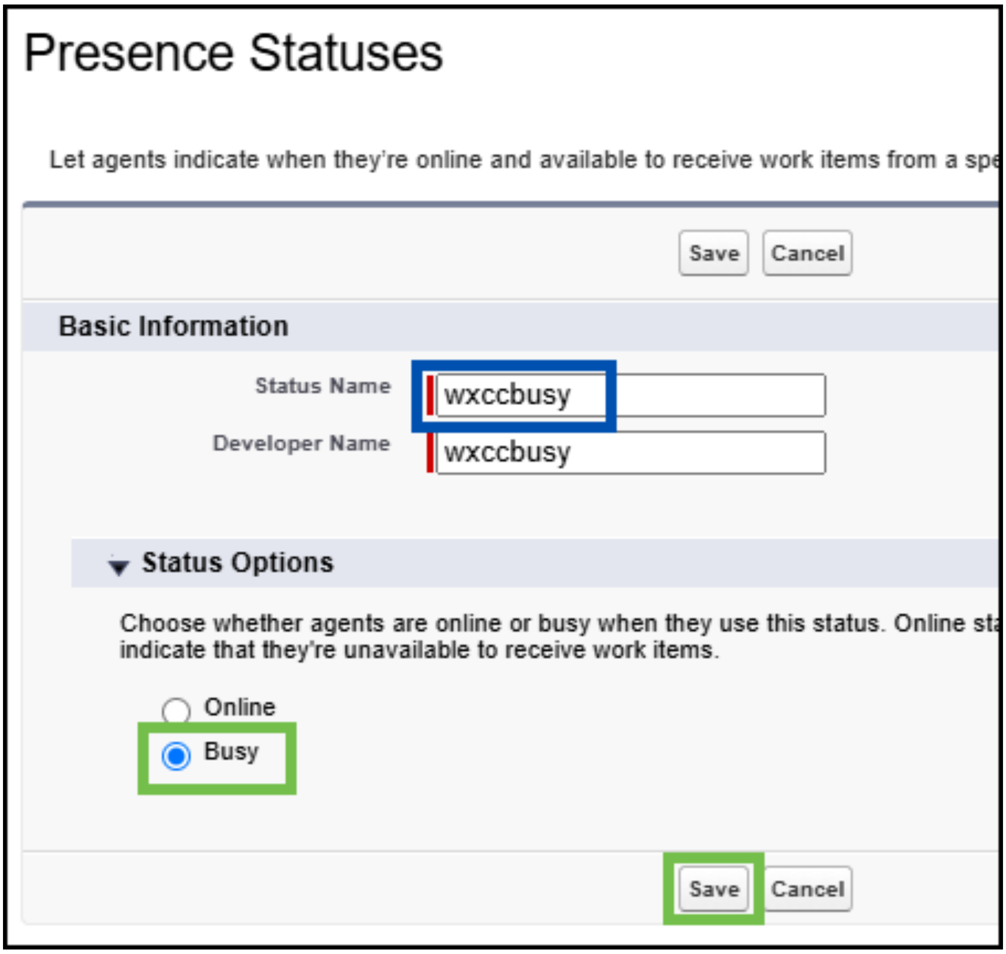
- In Salesforce, navigate to **'Setup'** by clicking the gear icon in the top-right corner and selecting **'Setup'**.

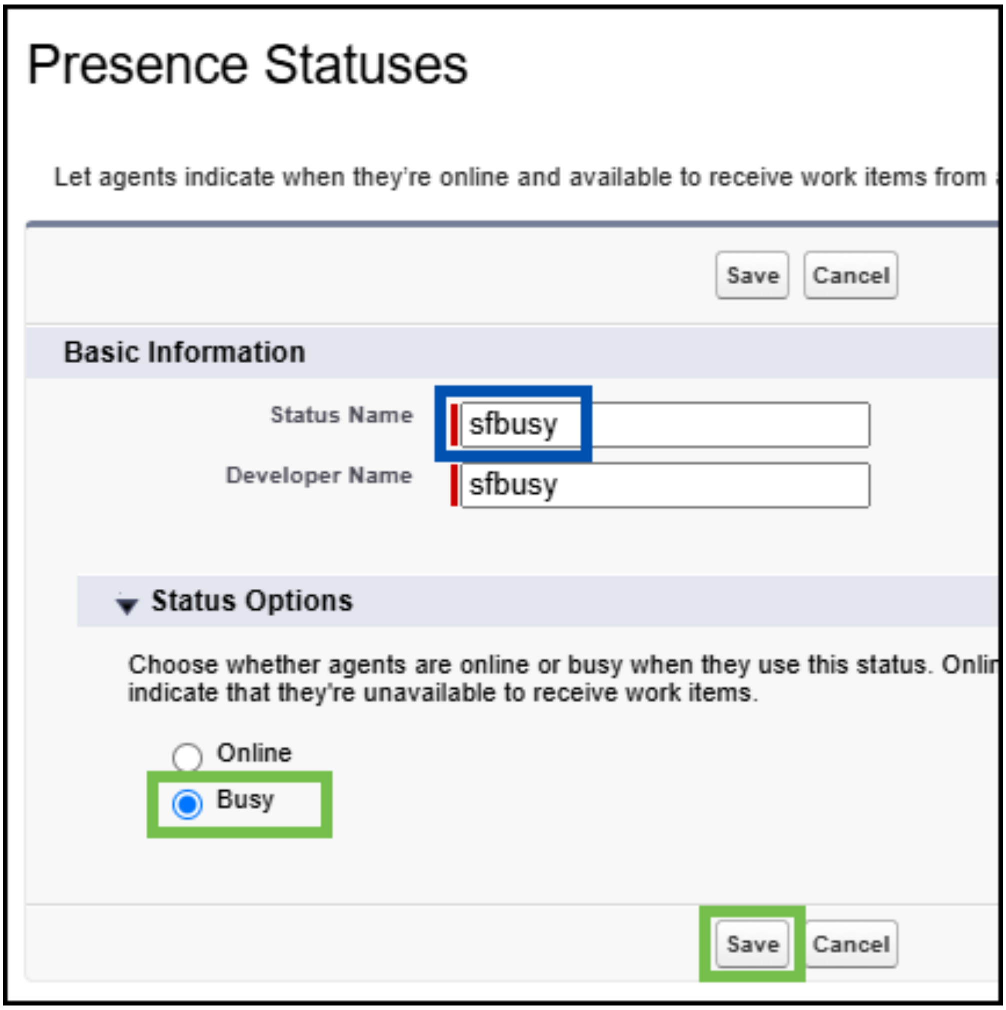



- Go to **'Feature Settings > Service > Omni-Channel > Presence Statuses'** (or type *Presence Statuses* in the search bar in the left-hand menu).




- 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'**.

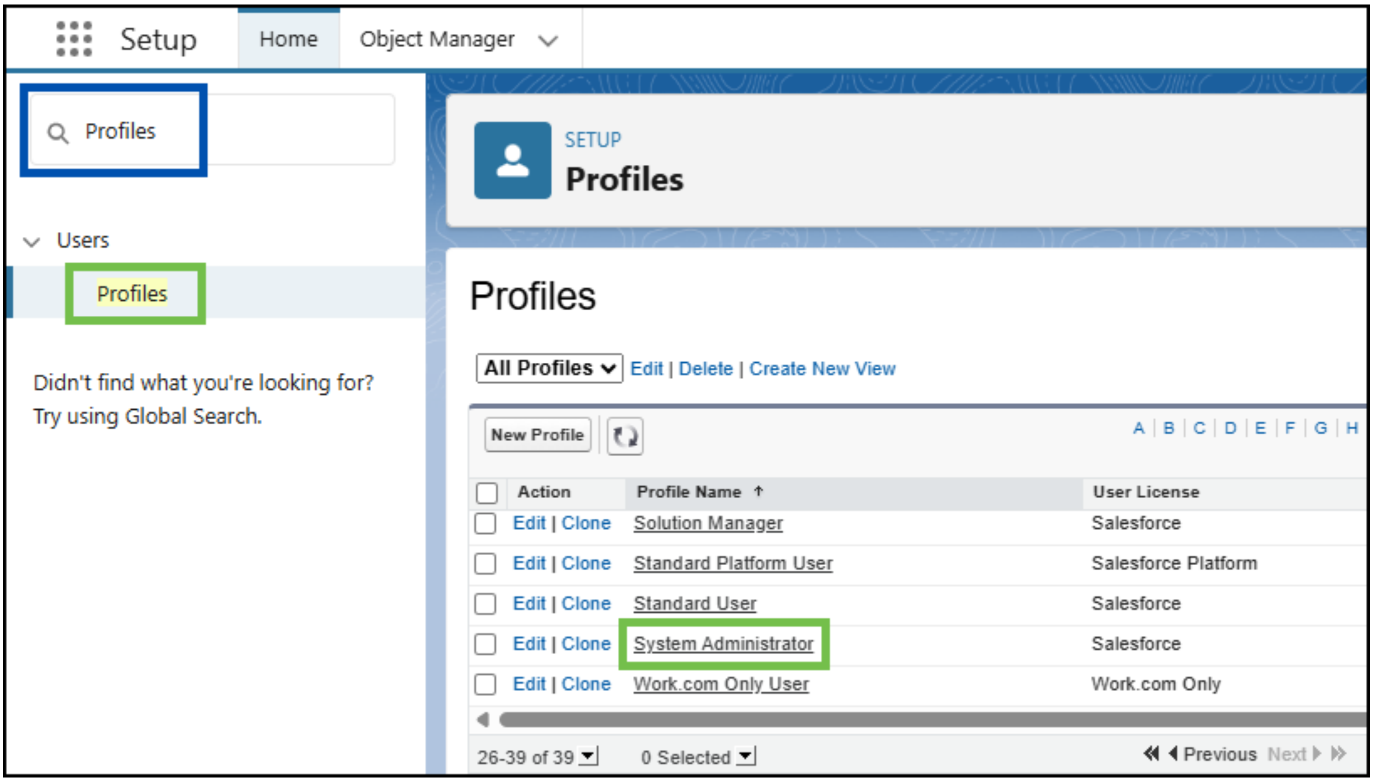

Presence Statuses
Let agents indicate when they're online and available to receive work items from a spe
Save
Cancel
Basic Information
Status Name
wxccbusy
Developer Name
wxccbusy
Status Options
Choose whether agents are online or busy when they use this status. Online sta
indicate that they're unavailable to receive work items.
Online
Busy
Save
Cancel



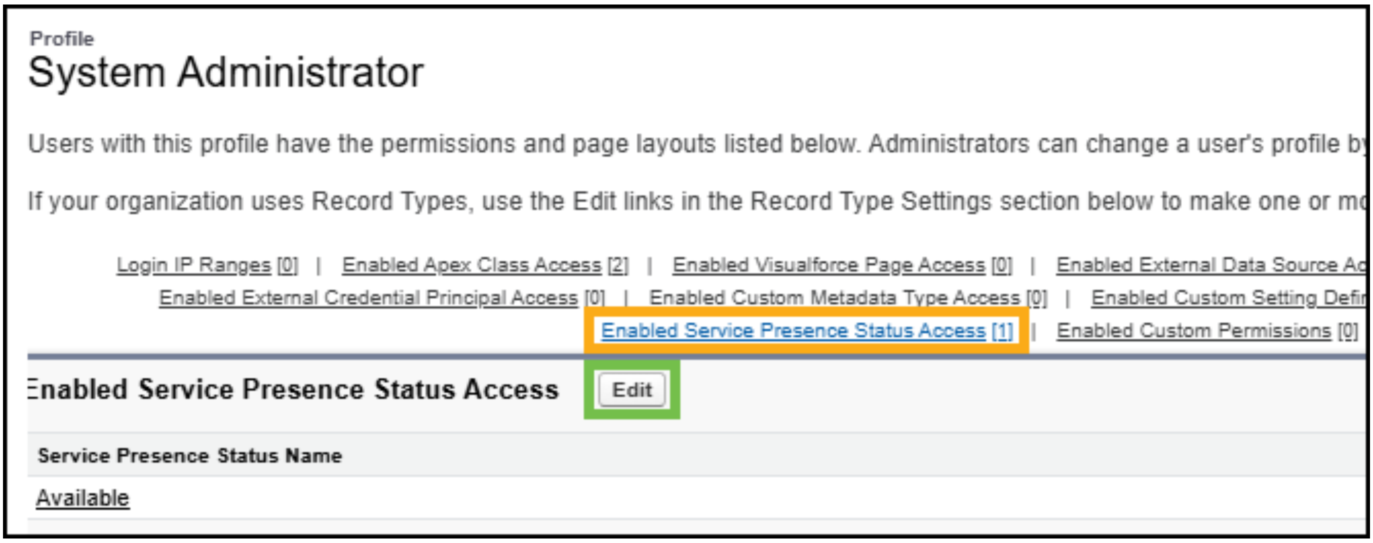

## 1.5.2 Section 2 - Enable Presence Statuses for the User Profile

- 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'**).

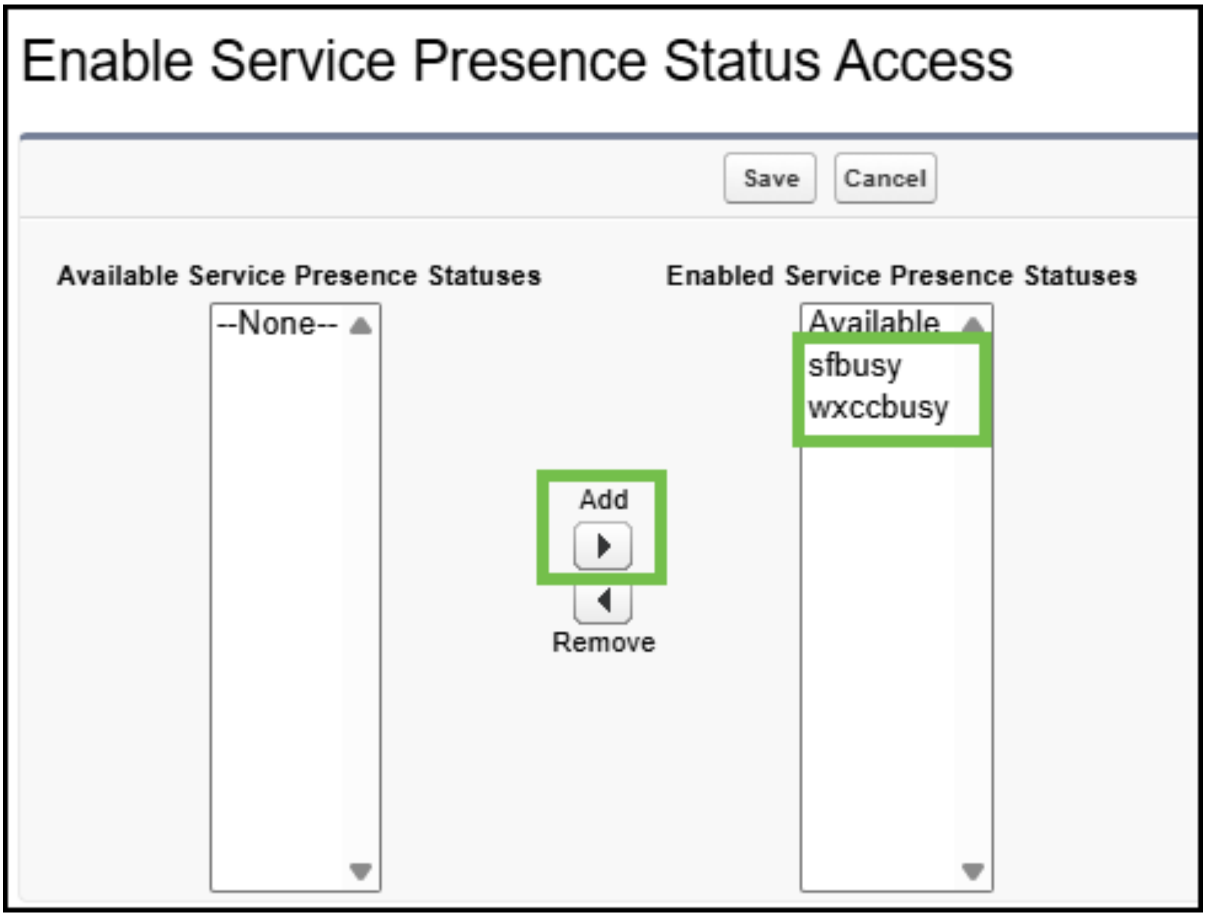
> **Note**
>
> For the purpose of this exercise, the **'System Administrator'** profile is used. Under normal circumstances, any other profile may be used by users.




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



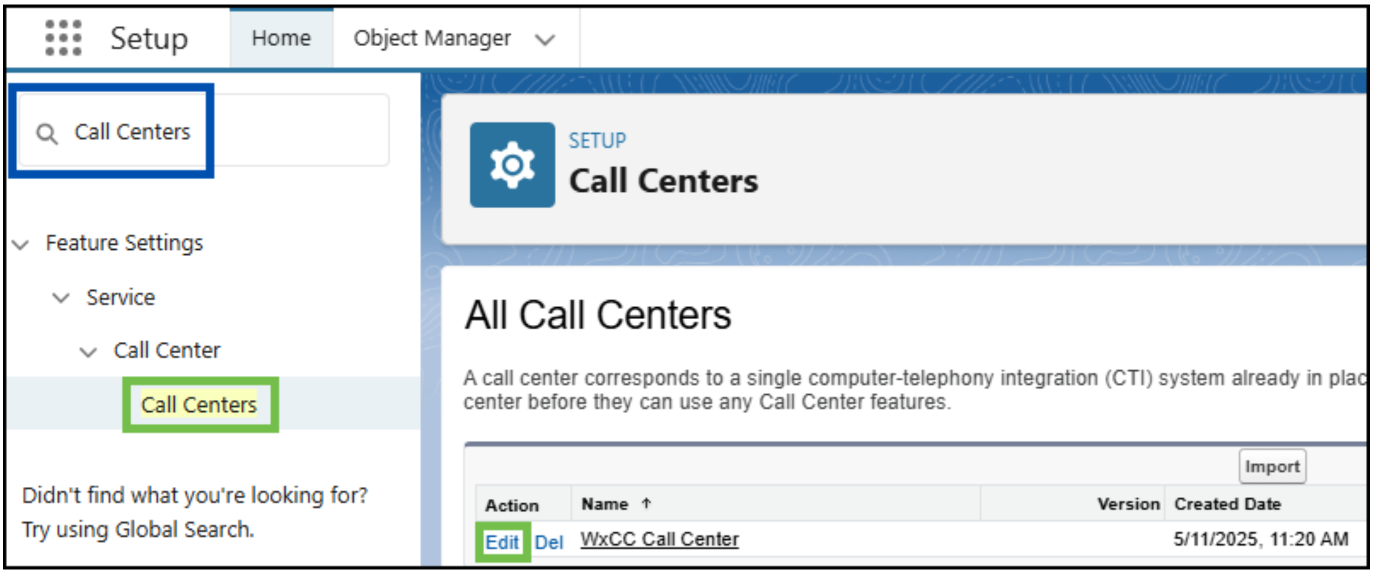

• Move **sfbusy** and **wxccbusy** from **'Available Service Presence Statuses'** to **'Enabled Service Presence Statuses'**.




- Click **'Save'**.

### 1.5.3 **Section 3 - Configure Omni-Channel State Sync in Call Center Settings**

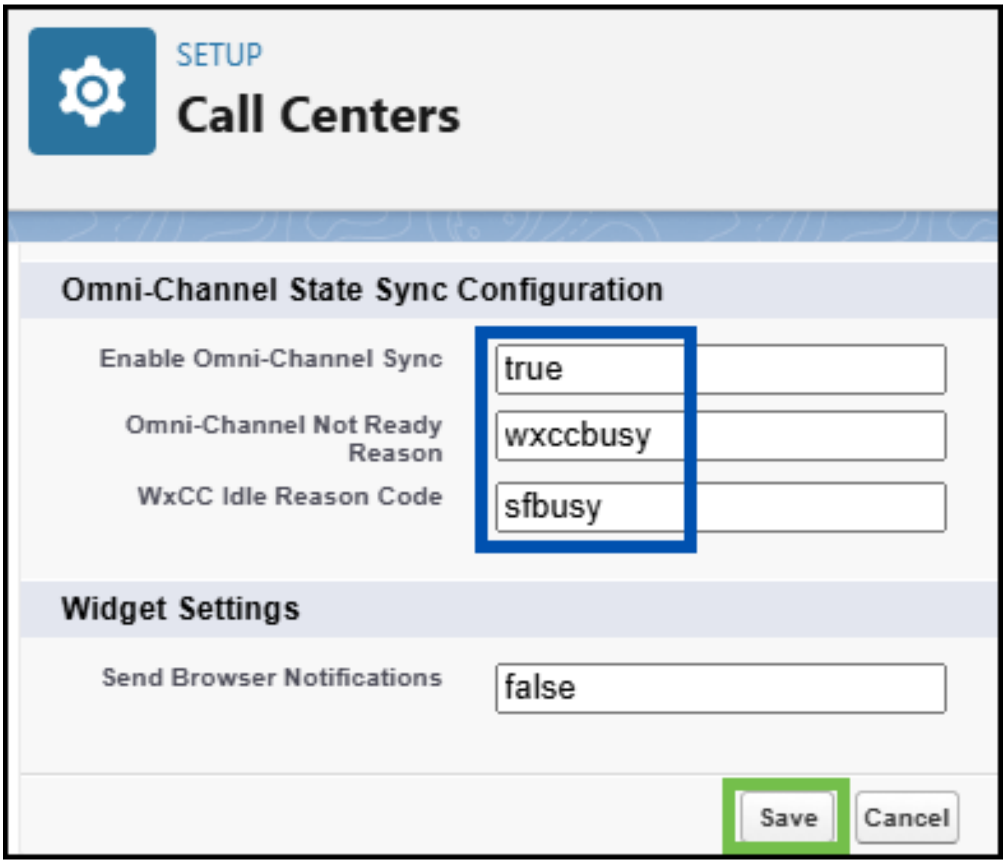
- Navigate to **'Feature Settings > Service > Call Center > Call Centers'** (or type *Call Centers* in the search bar in the left-hand menu).
- Click **'Edit'** for **'WxCC Call Center'**.




- 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.




- Click **'Save'**.

**Note**

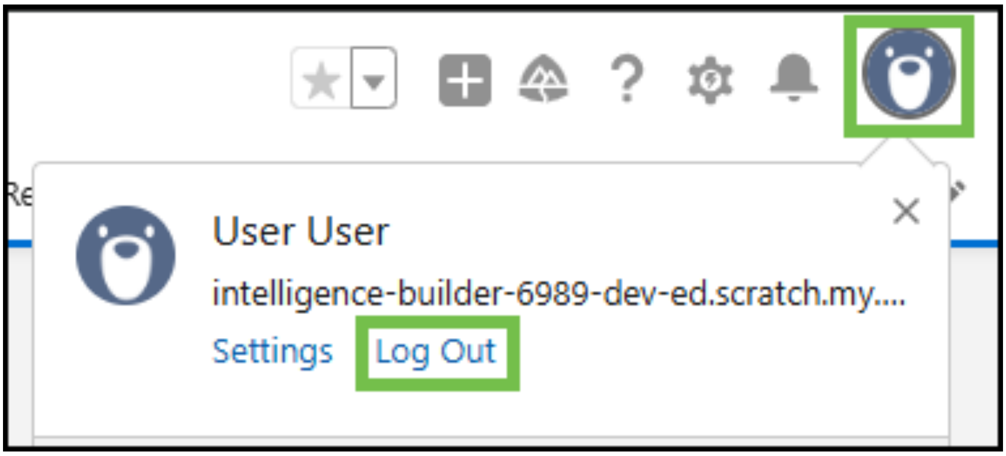
For the purpose of this lab, the idle code **sfbusy** has already been created on the Webex Contact Center side.

### 1.5.4 Section 4 - 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**

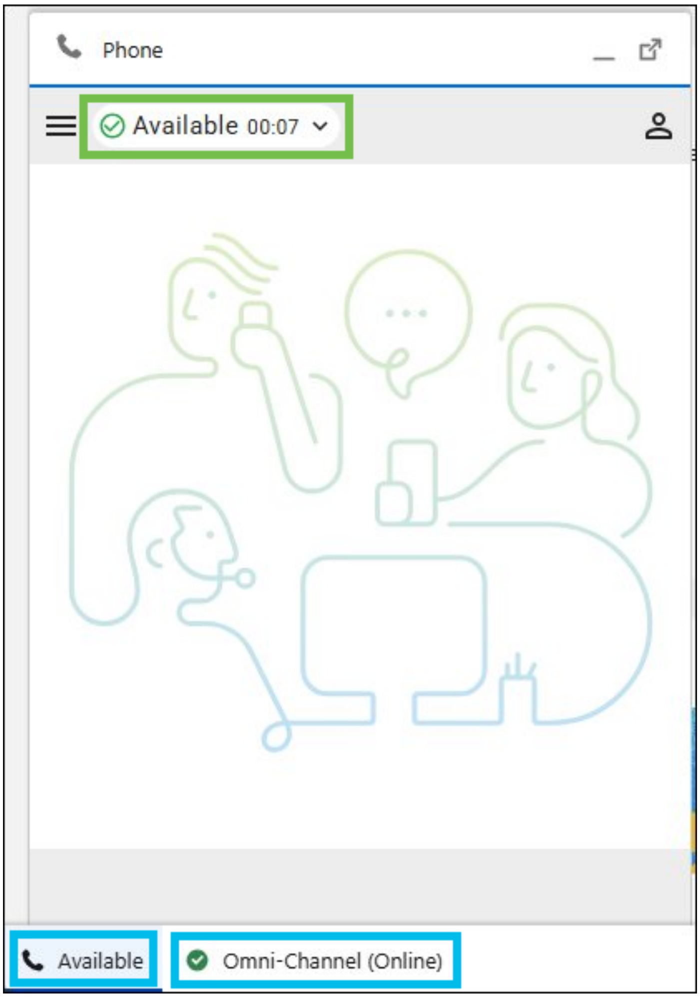
Please select the **'Desktop'** option for the phone number.

- 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 **wxccbusy** 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)

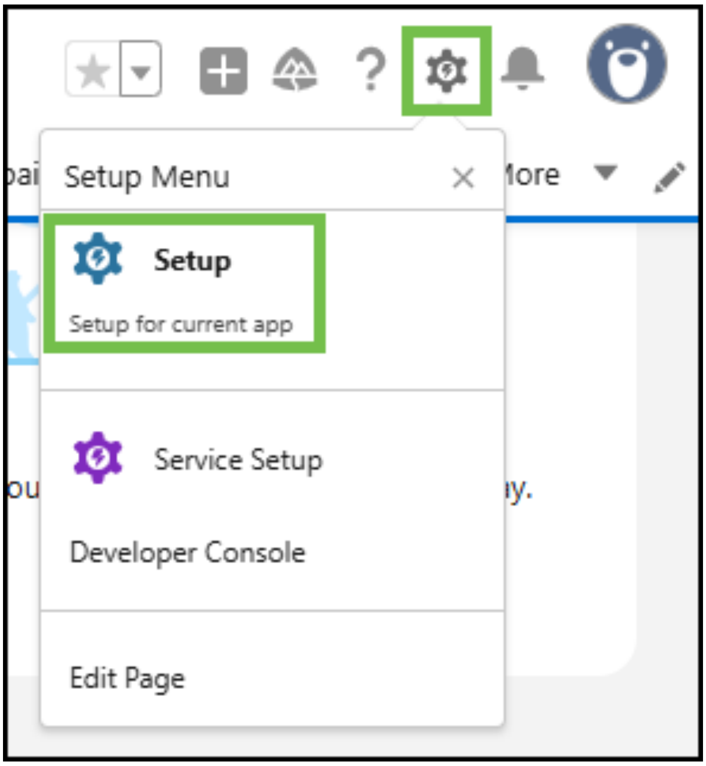

Omni-Channel
sfbusy
Inbox (0)
sfbusy
Omni-Channel (Busy)



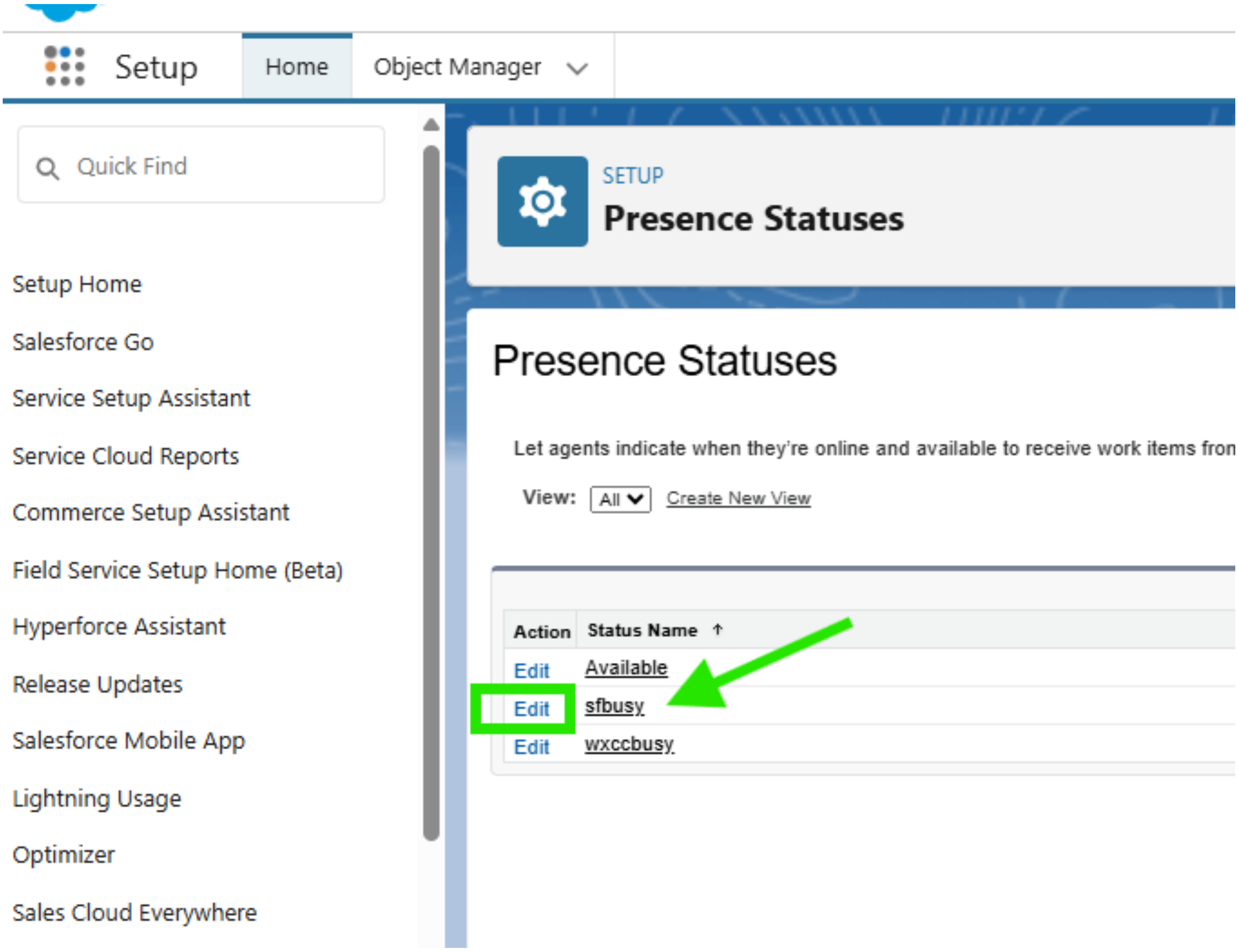

- Congratulations! You have completed the task.

## 1.5.5 Section 5 - Troubleshooting Failed Sync Due to Mismatched Idle Codes

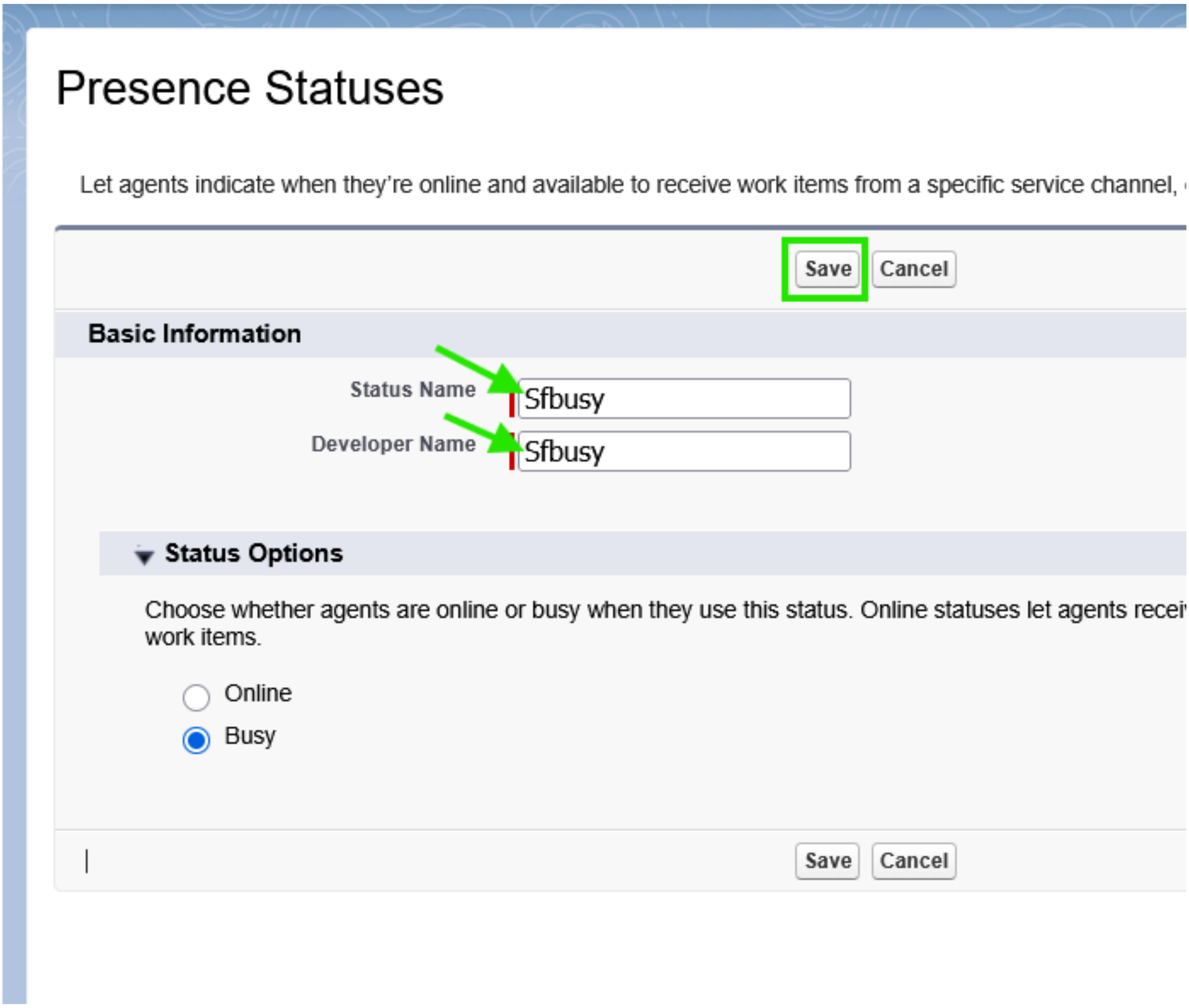
- In Salesforce, navigate to **'Setup'** by clicking the gear icon in the top-right corner and selecting **'Setup'**.



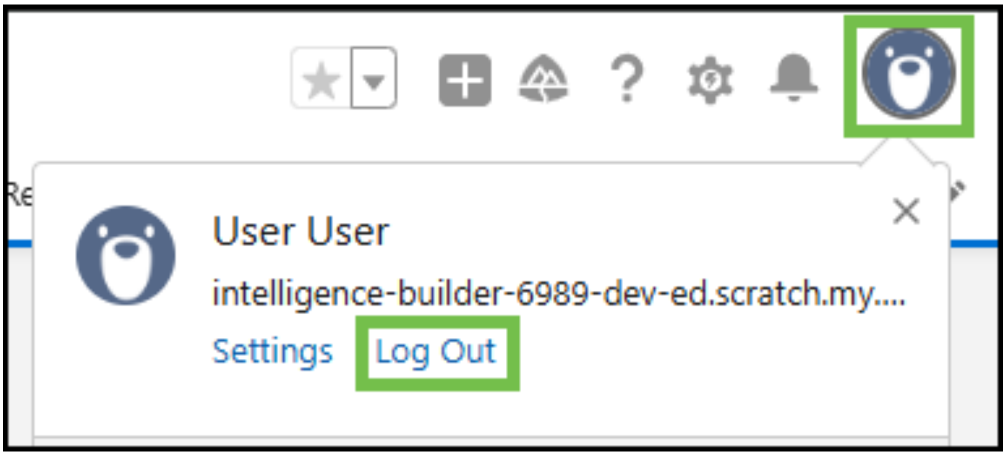

- Go to **'Feature Settings > Service > Omni-Channel > Presence Statuses'** (or type *Presence Statuses* in the search bar in the left-hand menu).
- Select **'Edit'** the Presence Status **sfbusy** created before




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

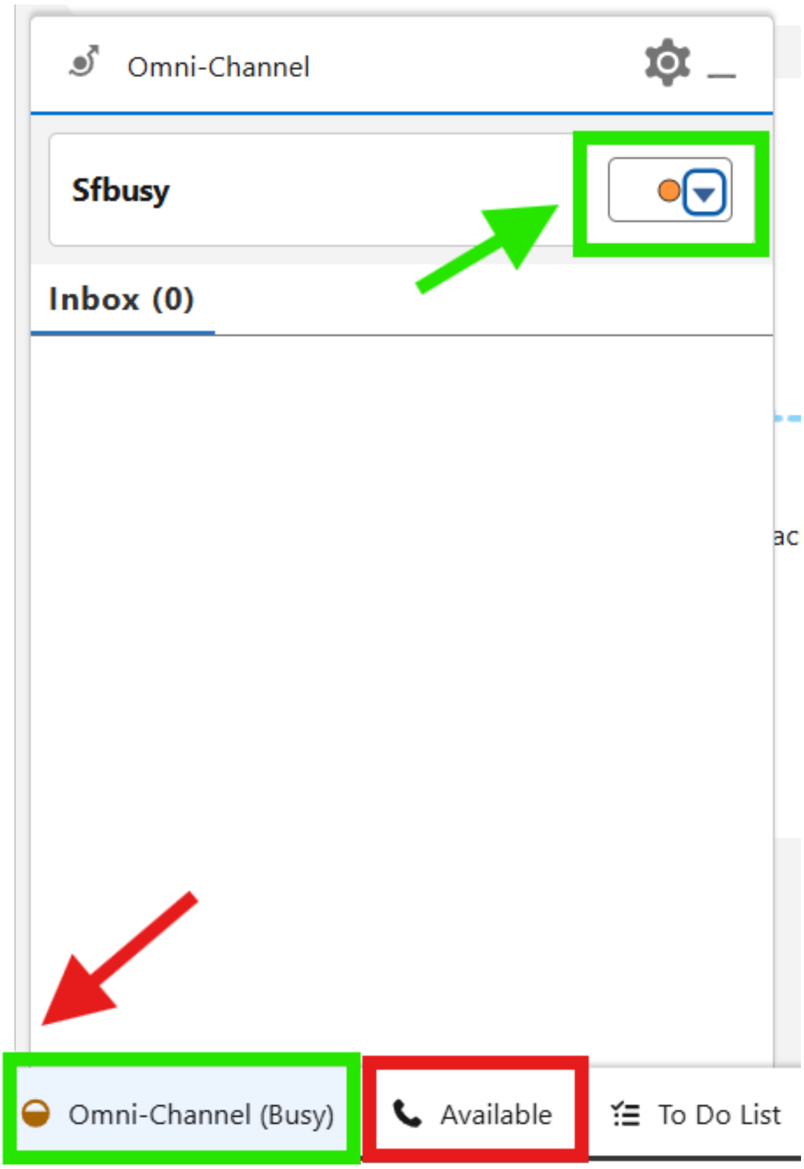



- Refresh Salesforce by logging out and logging back in (**make sure to close any other Salesforce tabs**).




- 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 thatthe Webex Contact Center widget still shows as **'Available'**




**Reason**

When presence status on **sfbusy** is updated to **Sfbusy**, presence sync becasue 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 Task 4 - Data Lookup Using CAD Variables

Please use the following credentials to complete the tasks:

| | |
|---|---|
| `Control Hub` | https://admin.webex.com |
| `Salesforce` | https://login.salesforce.com/ |
| `WxCC Username` | labuser**ID**@wx1.wbx.ai 📋 *(where **ID** is your selected pod number (01 through 30); i.e. labuser**02**@wx1.wbx.ai if selected pod is 2)* |
| `WxCC Password` | webexONE1! 📋 |
| `Salesforce Username` | labuser**ID**@wx1.wbx.ai 📋 *(where **ID** is your selected pod number (01 through 30); i.e. labuser**02**@wx1.wbx.ai if selected pod is 2)* |
| `Salesforce Password` | webexONE1! 📋 |

**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**

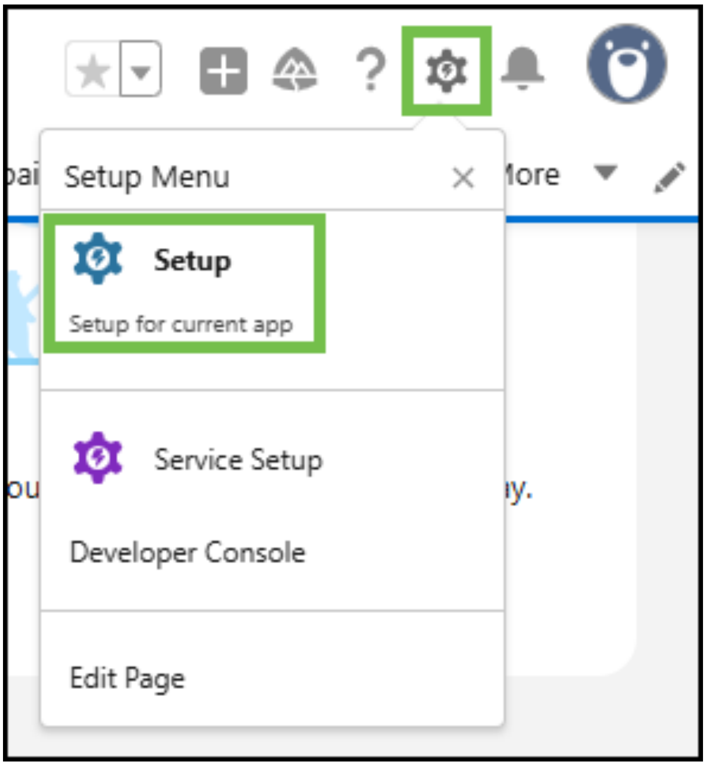
- Configure Call Center in Salesforce for advanced screen pop functionality.
- Customize and publish a Webex Contact Center flow with Salesforce integration.
- Test the integration by triggering a Salesforce contact creation via a phone call.

### 1.6.1 Section 1 - Salesforce Configuration

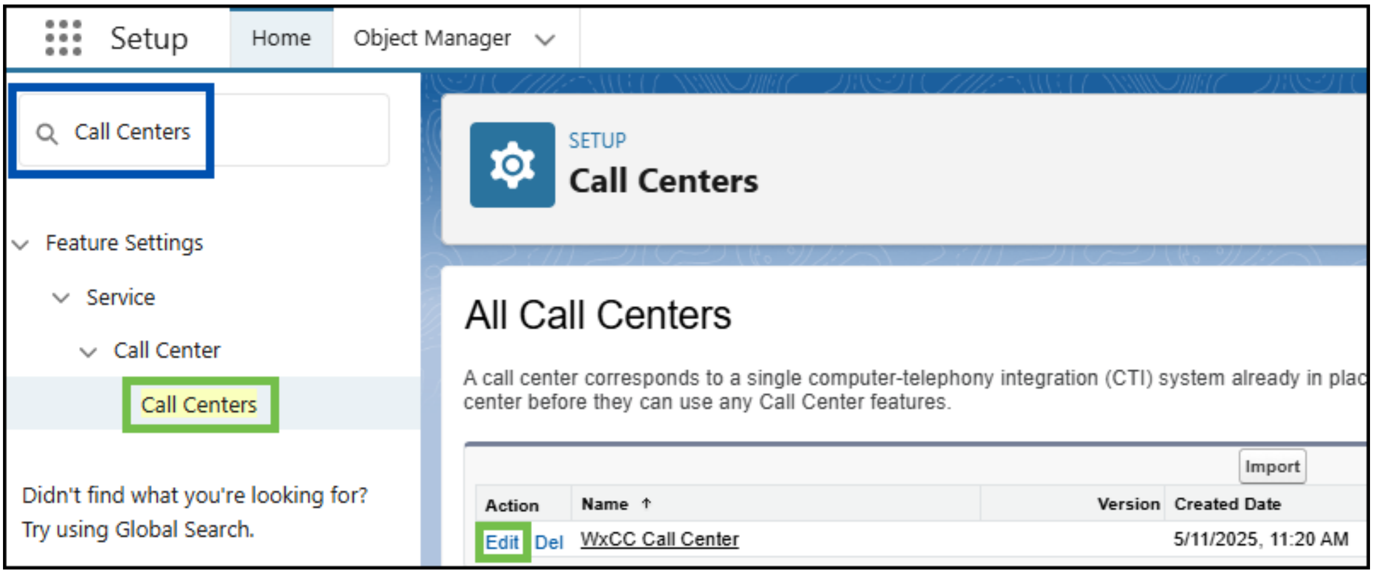
**Attention**

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'**

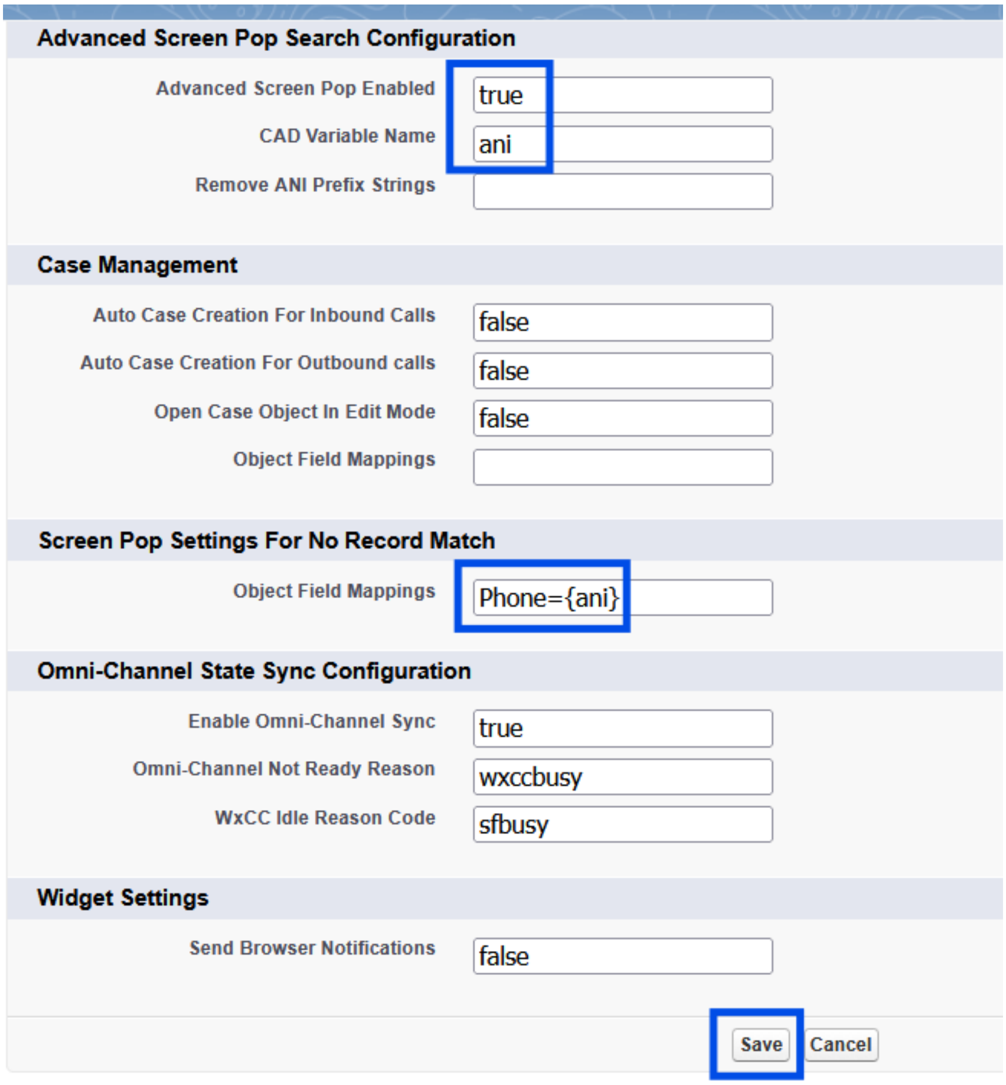



- Go to **'Feature Settings > Service > Call Center > Call Centers'** (or type *Call Centers* in the search bar in the left-hand menu).
- Click **'Edit'** for **'WxCC Call Center'**.




- 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:

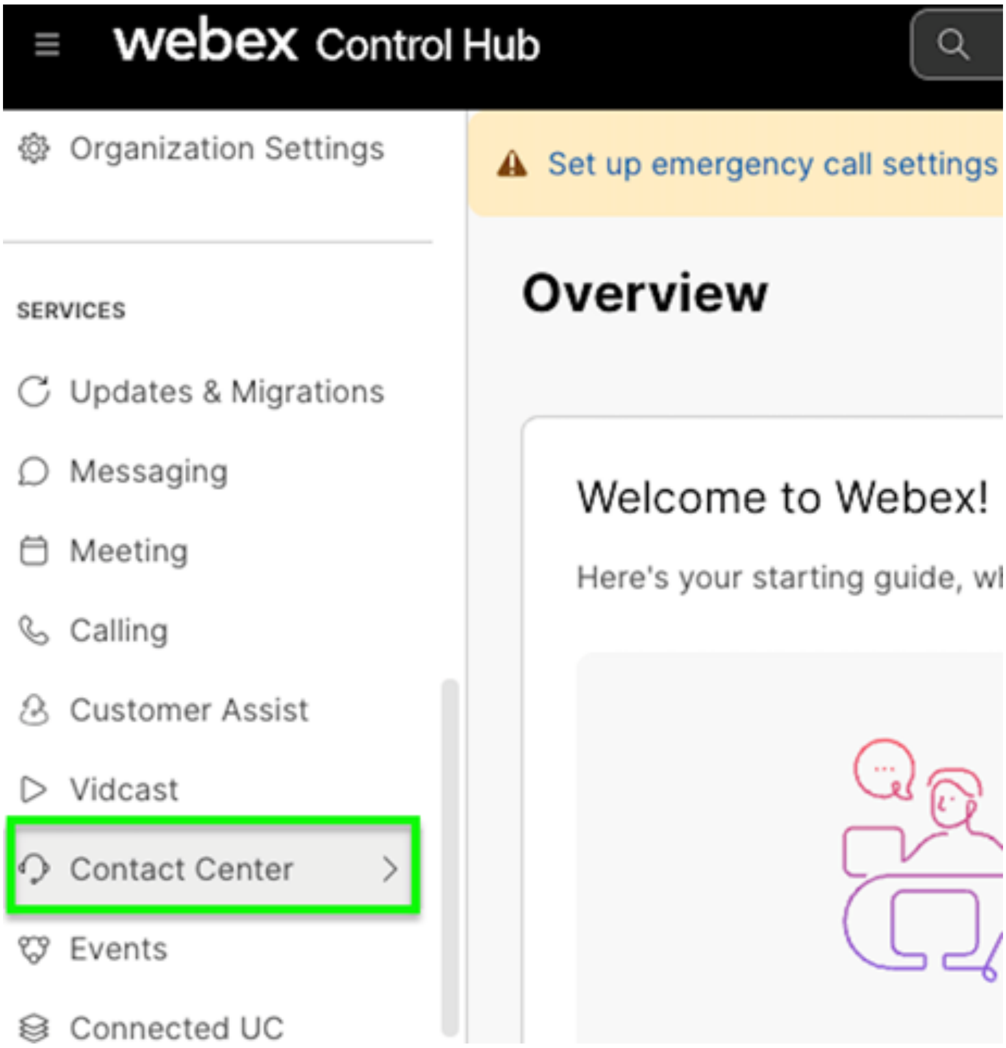
```
Phone={ani}
```



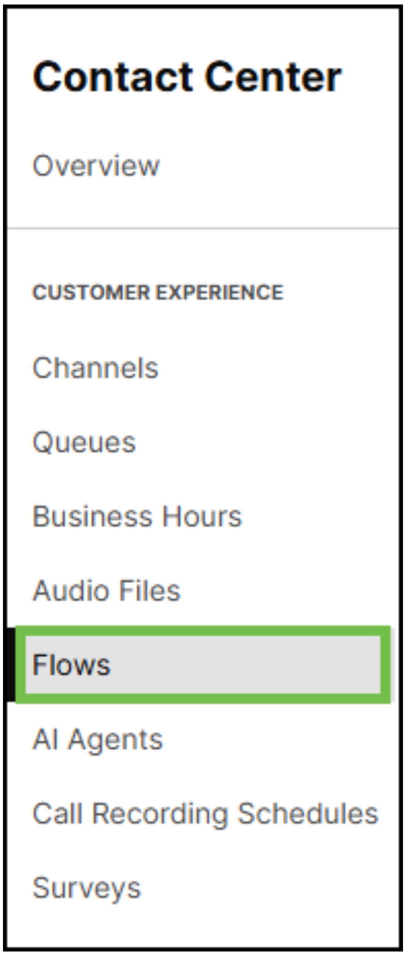

- Click **'Save'**.

### 1.6.2 **Section 2 - Webex Contact Center Configuration**

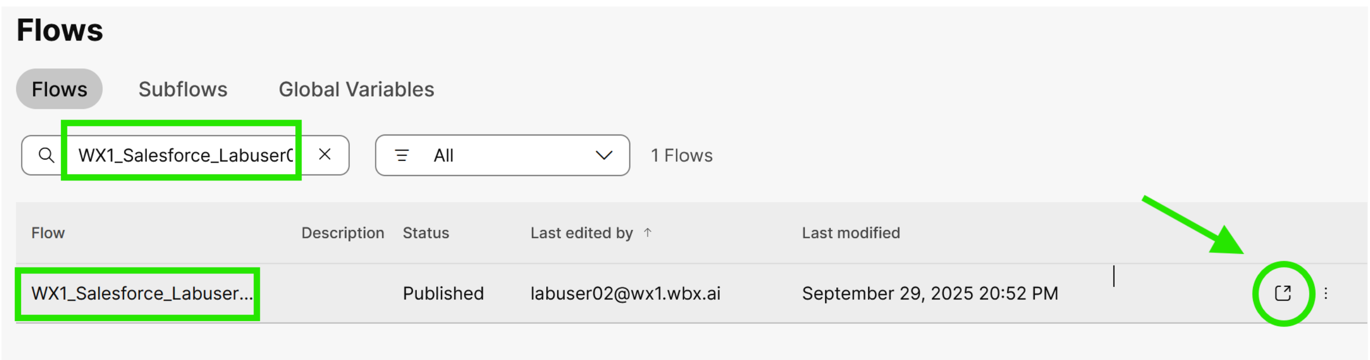
- Log in to the https://admin.webex.com using the credentials provided at the top of this page.
- Click on Contact Center in the left-hand side navigation pane of the Webex Control Hub.



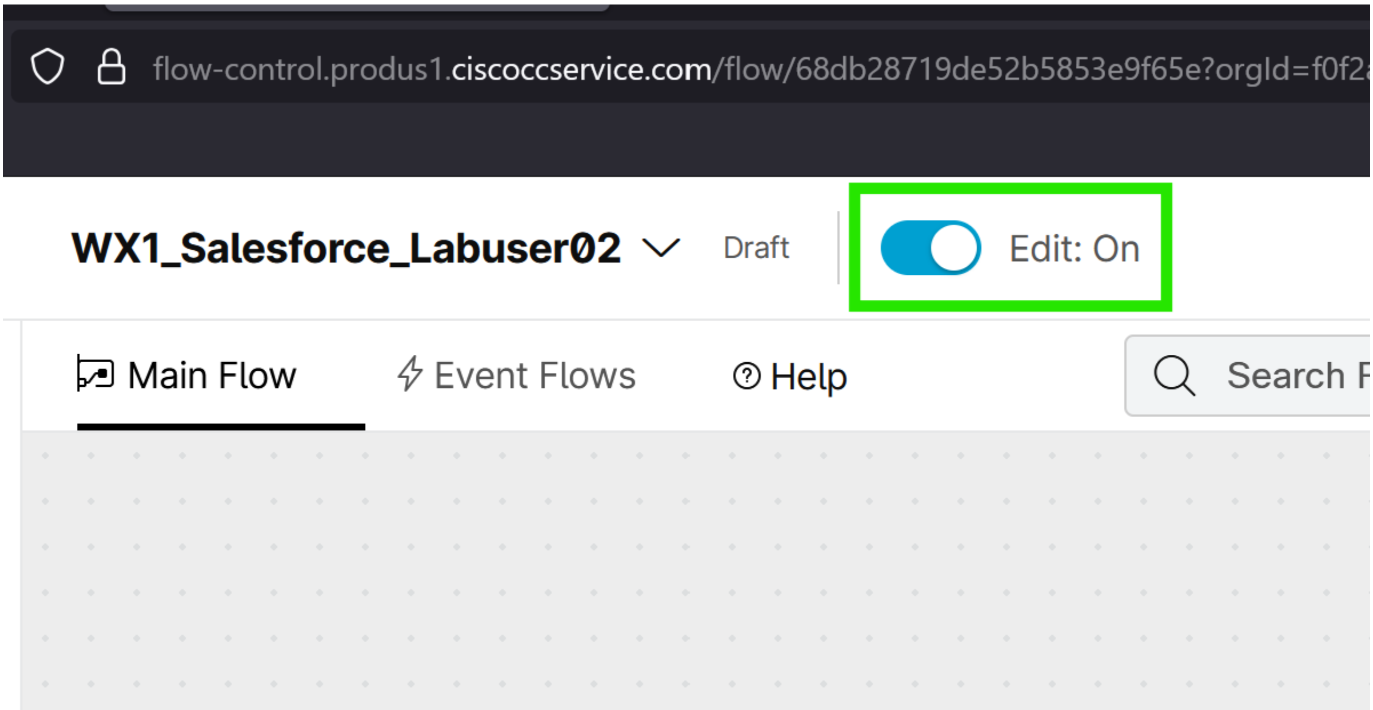

• After logging in, navigate to the **'Flows'** menu on the left-hand side.




- Search for the flow named **WX1_Salesforce_LabuserID** *(where **ID** is your selected pod number (01 through 30); i.e. WX1_Salesforce_Labuser02 if selected pod is 2)* and open the flow by selecting **Go to Flow Designer** by clicking the icon on the right.



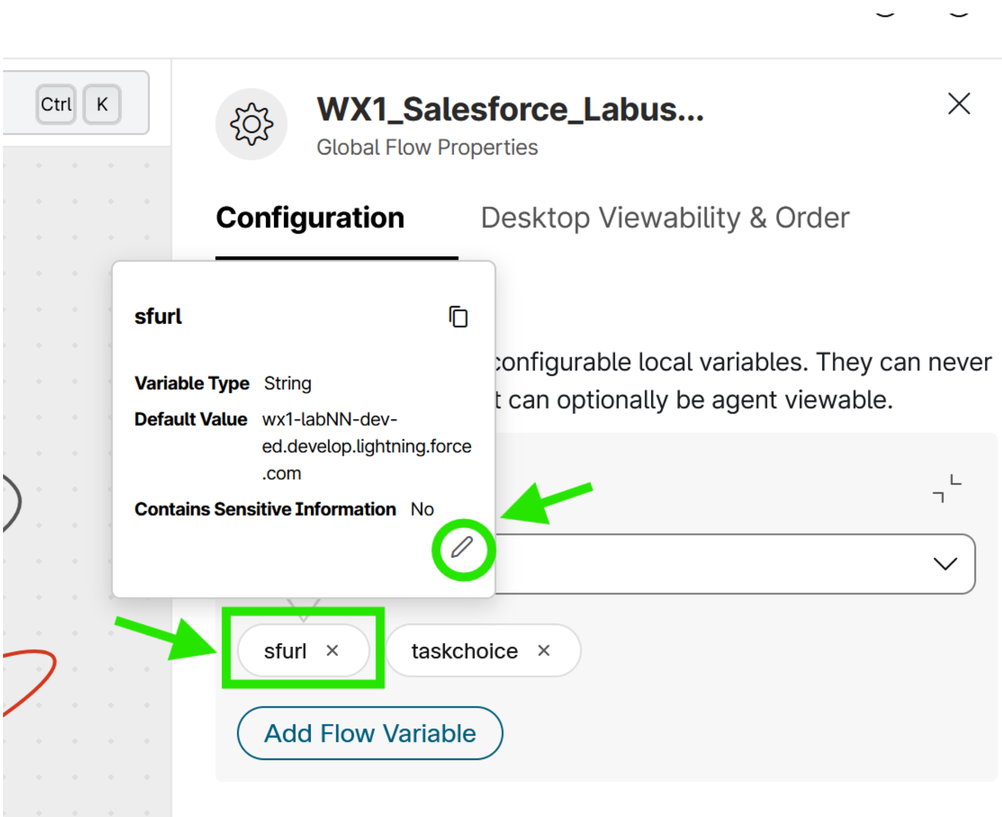

- Turn edit mode by: **'Edit'** is set to **'On'**

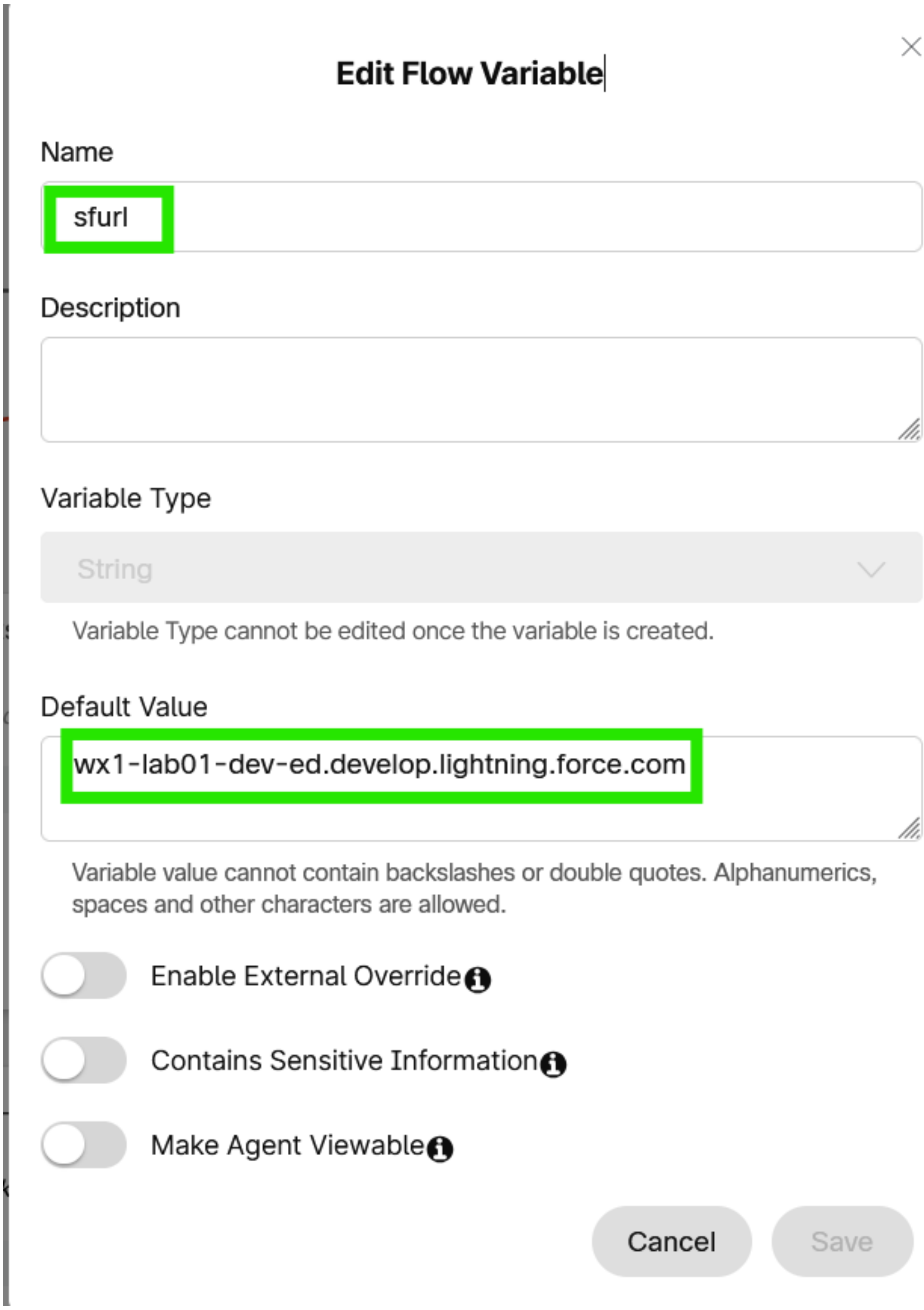



- Click on an empty space in the flow, then on the right-hand side, scroll down to navigate to **'Custom Variables > Flow Variables'** section.
- Click on **sfurl** flow variable, select the **'Edit'** option (pencil icon), replace **NN** with the attendee number which is the fully qualified domain name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

**Attention**

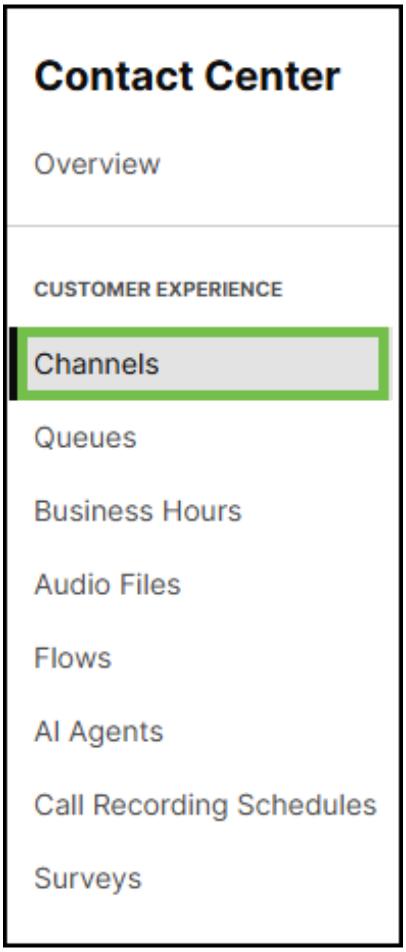
The FQDN used for the **sfurl** variable must end with **.lightning.force.com**. While logged into the Salesforce portal, you can find the name of the Salesforce organization in the browser's address field. Note that the Salesforce Setup page will have a different domain ending (it does not end with **.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**.


Ctrl
K
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
t can optionally be agent viewable.
sfurl
taskchoice
Add Flow Variable

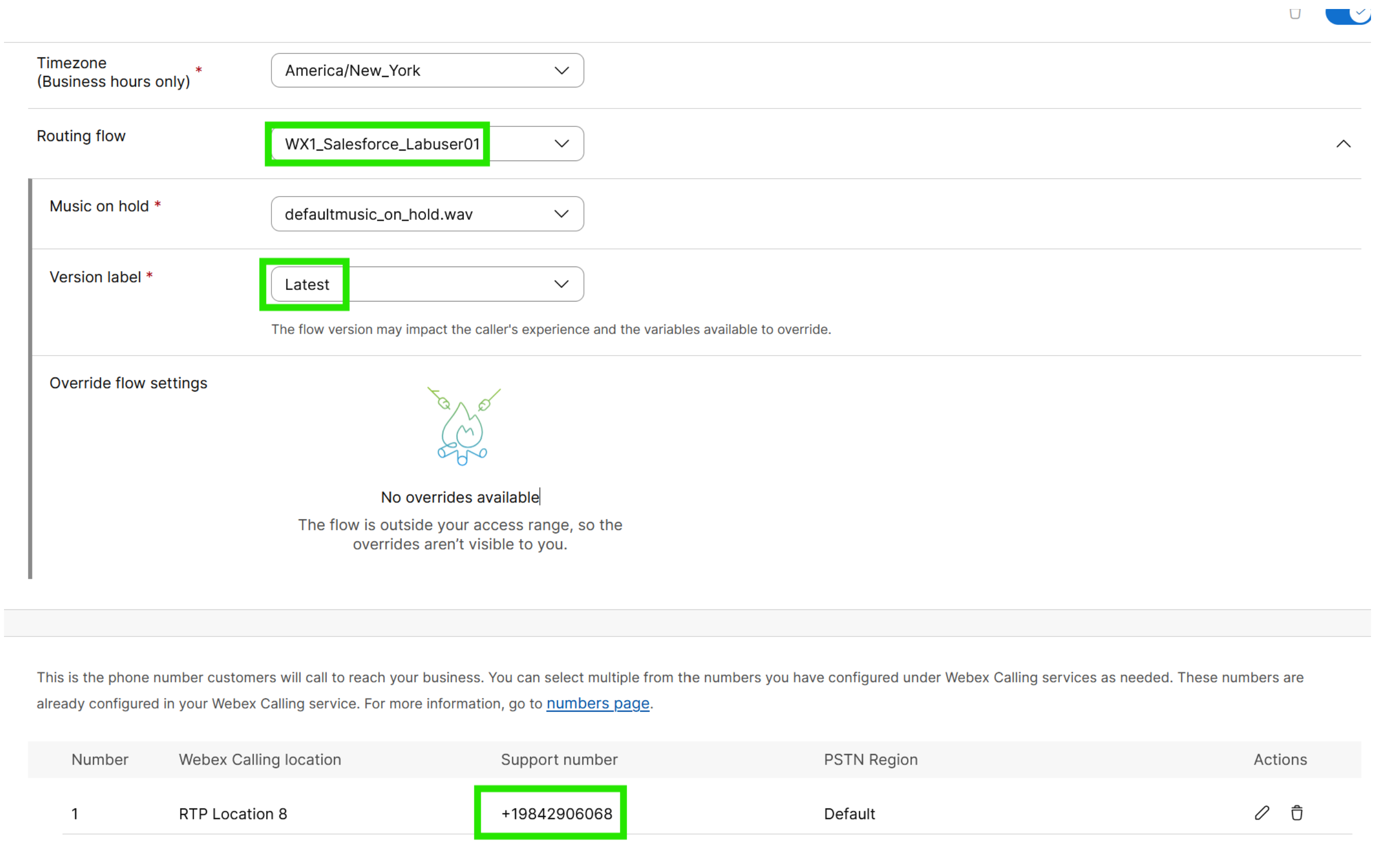



- Turn Flow Validation **'On'** by clicking the **'Validation'** button at the bottom of the page to publish the flow. Once validation is complete, click **'Publish Flow'** and then **'Publish Flow'** again in the next dialog box (**Latest** version label is selected automatically).


- Navigate to the **'Channels'** menu in the Webex Contact Center configuration.



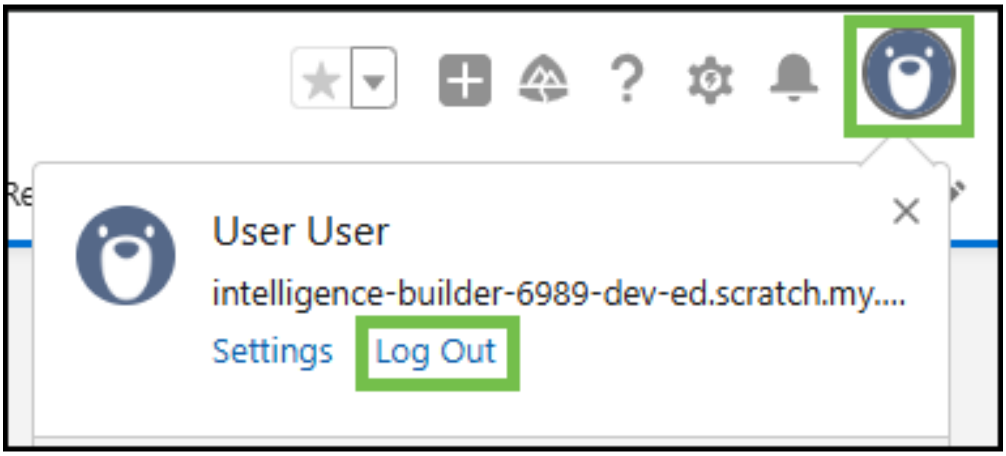

- Open **WebexOne_AI_EntryPoint_ID** (where **'iD'** is your lab user number, e.g., *labuser**07**@wx1.wbx.ai* ), verify that your flow is under 'Routing Flow'
- Note down the **'Support Number'** associated with this channel - it will be needed later in this lab for testing.




## 1.6.3 Section 3 - Testing

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

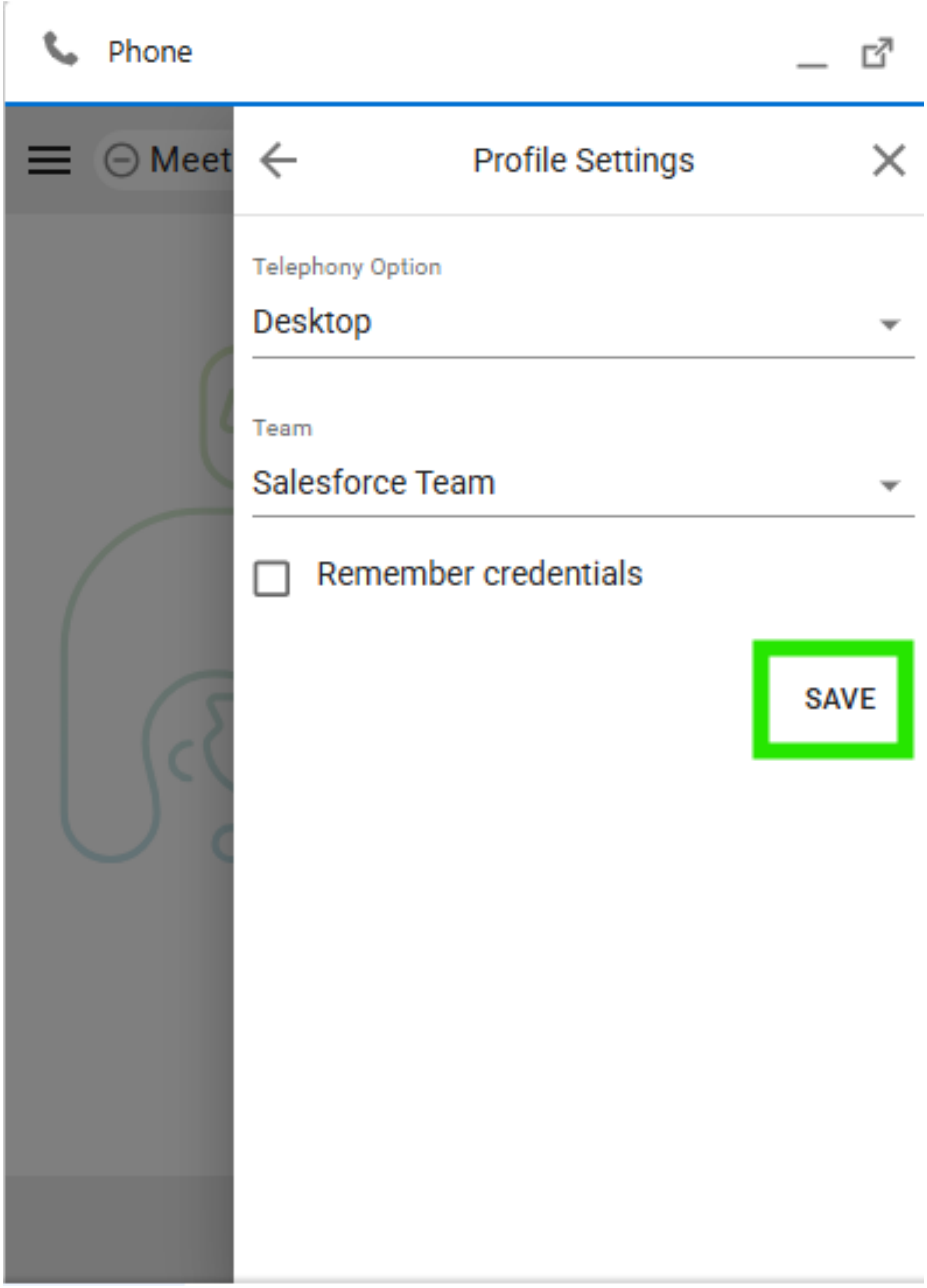
- Refresh Salesforce by logging out and logging back in (**make sure to close any other Salesforce tabs**).



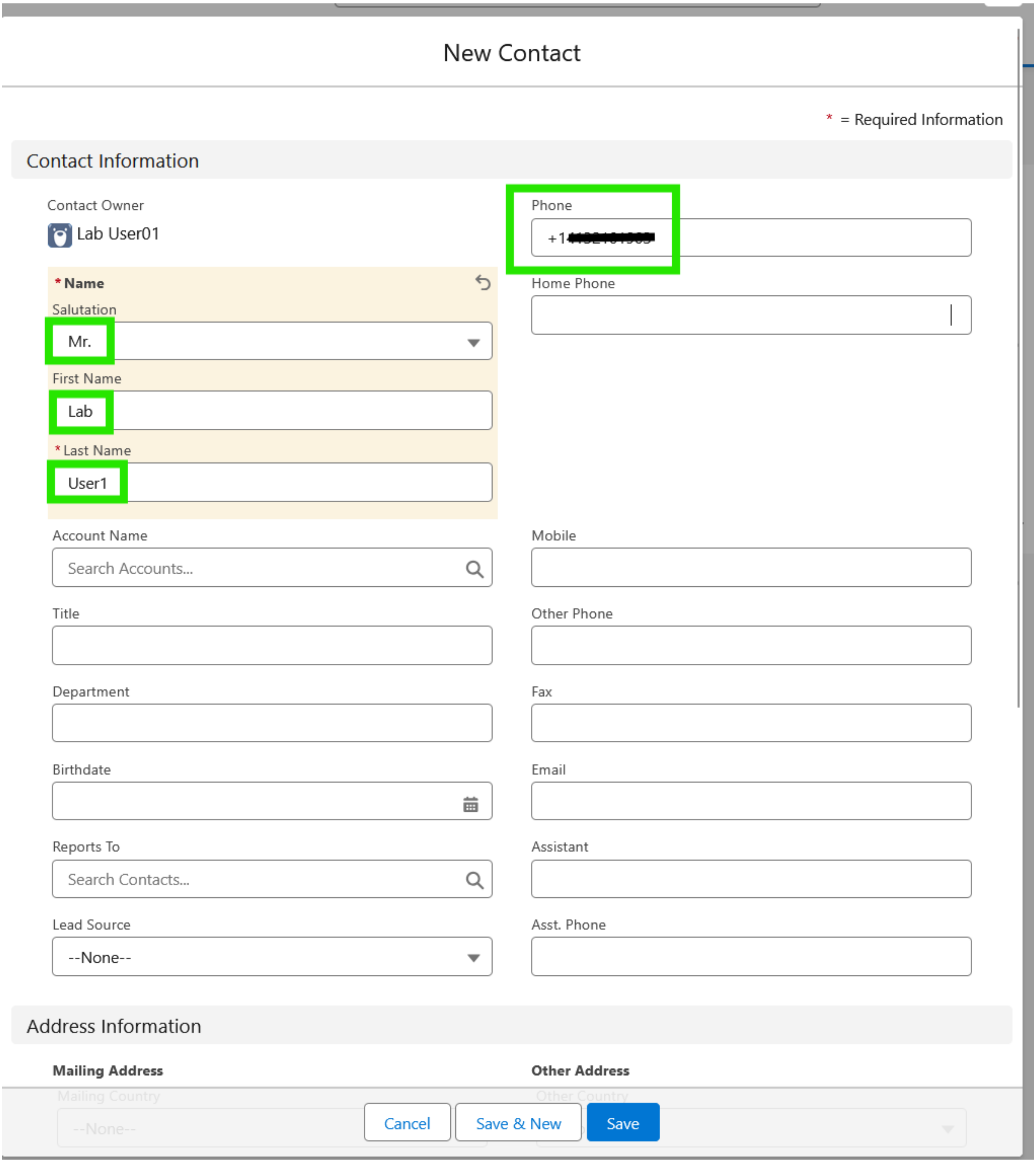

- Open the Webex Contact Center phone widget and login using the selected Webex Contact Center credentials.
- For the team use **Salesforce Team**.

**Reminder**

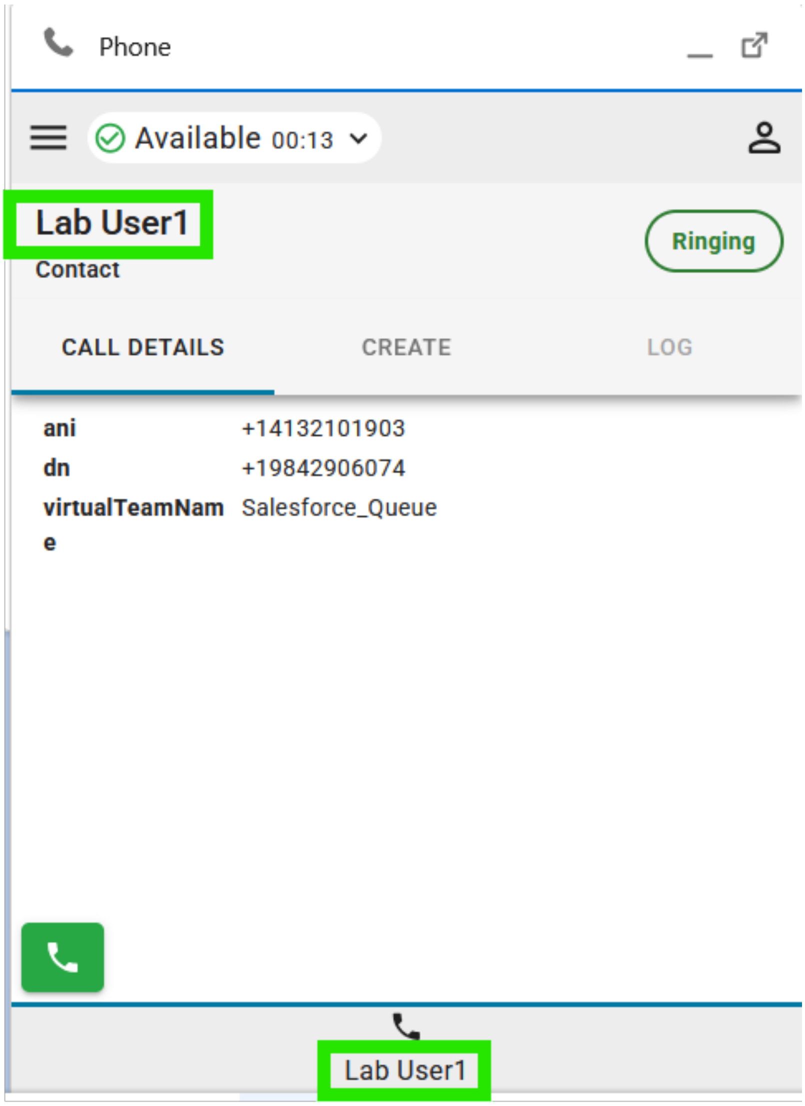
Please select the **'Desktop'** option for the phone number.




- 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.




- 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 Task 5 - Case Lookup Using Custom CAD Variables and Agent Desktop Screen Pop

Please use the following credentials to complete the tasks:

| | |
|---|---|
| `Control Hub` | https://admin.webex.com |
| `Salesforce` | https://login.salesforce.com/ |
| `WxCC Username` | labuser**ID**@wx1.wbx.ai 📋 *(where **ID** is your selected pod number (01 through 30); i.e. labuser**02**@wx1.wbx.ai if selected pod is 2)* |
| `WxCC Password` | webexONE1! 📋 |
| `Salesforce Username` | labuser**ID**@wx1.wbx.ai 📋 *(where **ID** is your selected pod number (01 through 30); i.e. labuser**02**@wx1.wbx.ai if selected pod is 2)* |
| `Salesforce Password` | webexONE1! 📋 |

**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**

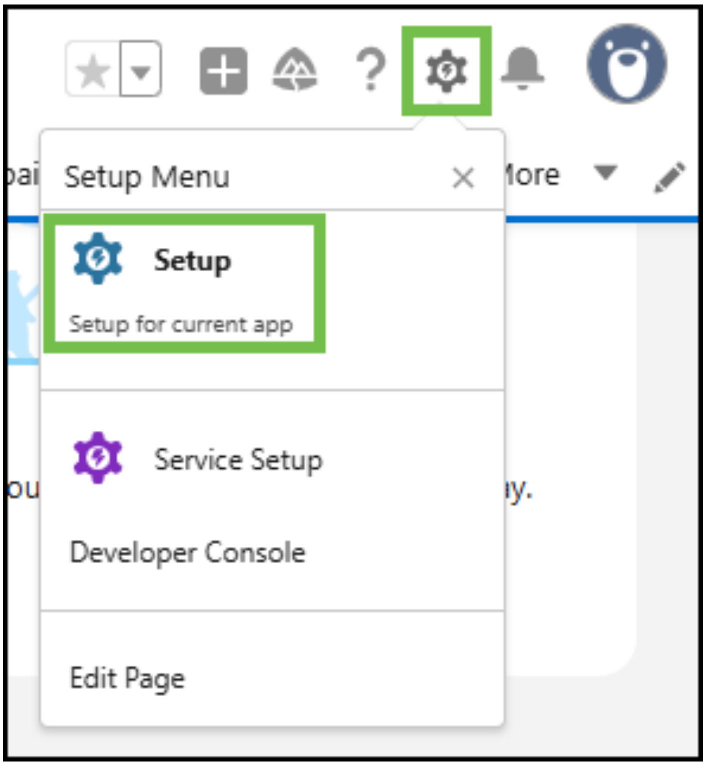
- Update Salesforce Call Center settings to enable advanced screen pop with the case variable.
- Test case creation and retrieval in Salesforce via the Webex Contact Center phone widget.
- Have the case list open in a new tab during case retrieval.

### 1.7.1 Section 1 - Modifying Call Center Options in Salesforce

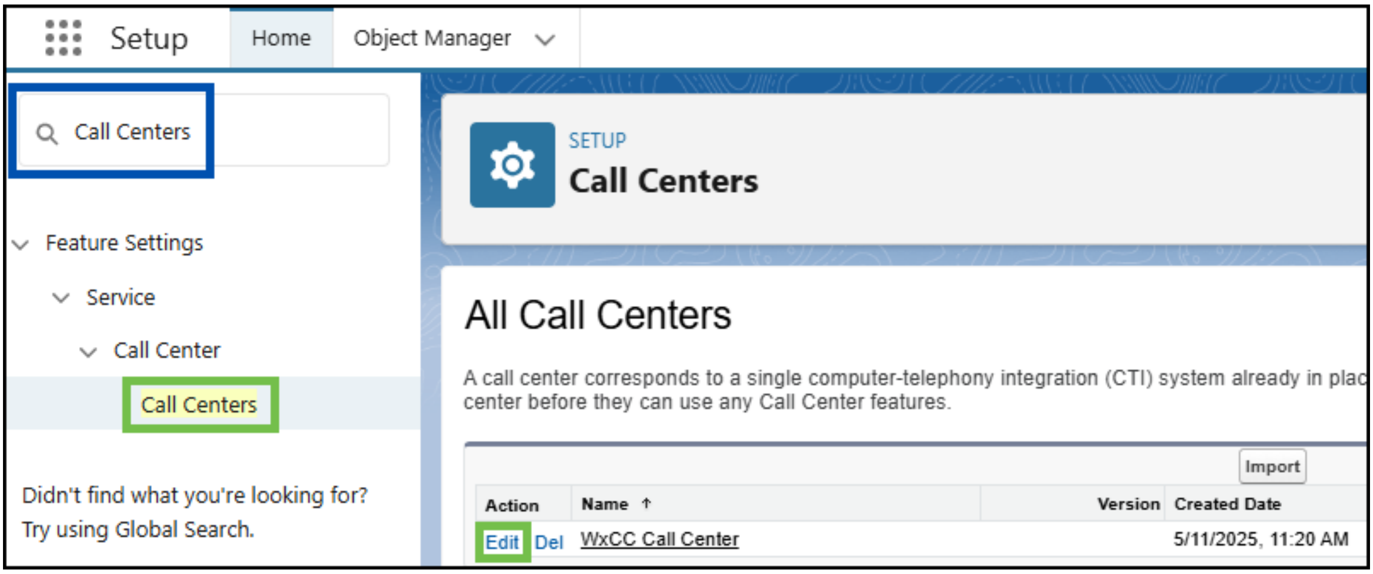
**Attention**

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

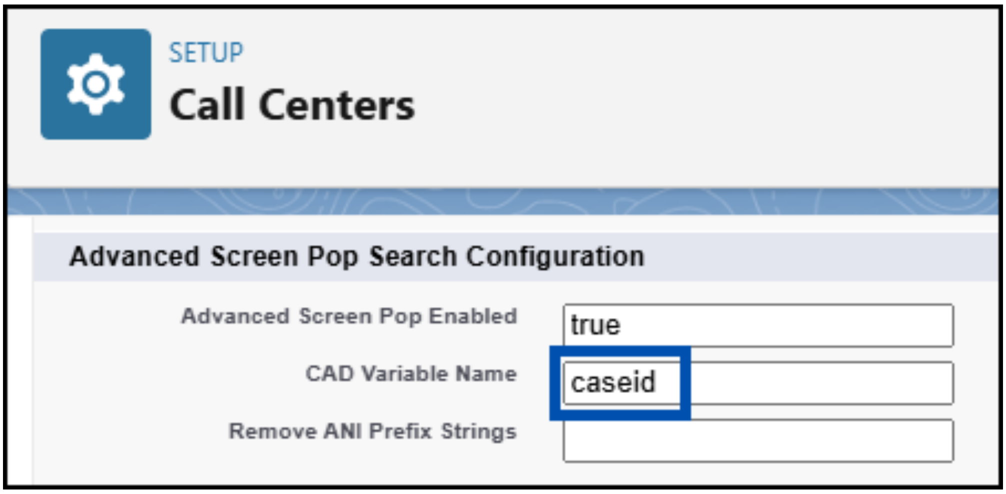
- Navigate to **'Setup'** by clicking the gear icon in the top-right corner and selecting **'Setup'**.




- 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'**

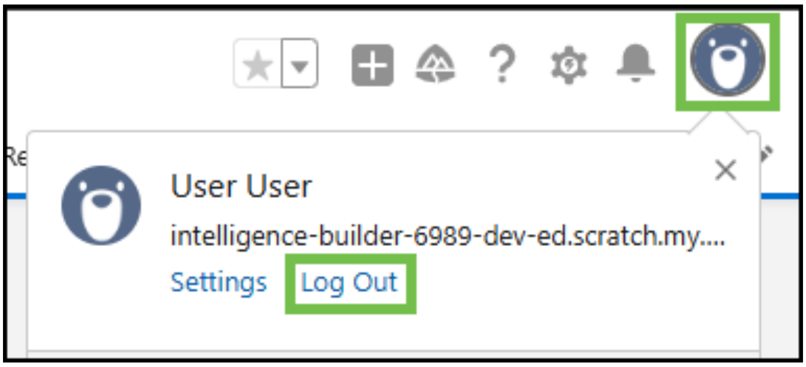



### 1.7.2 **Section 2 - Testing**

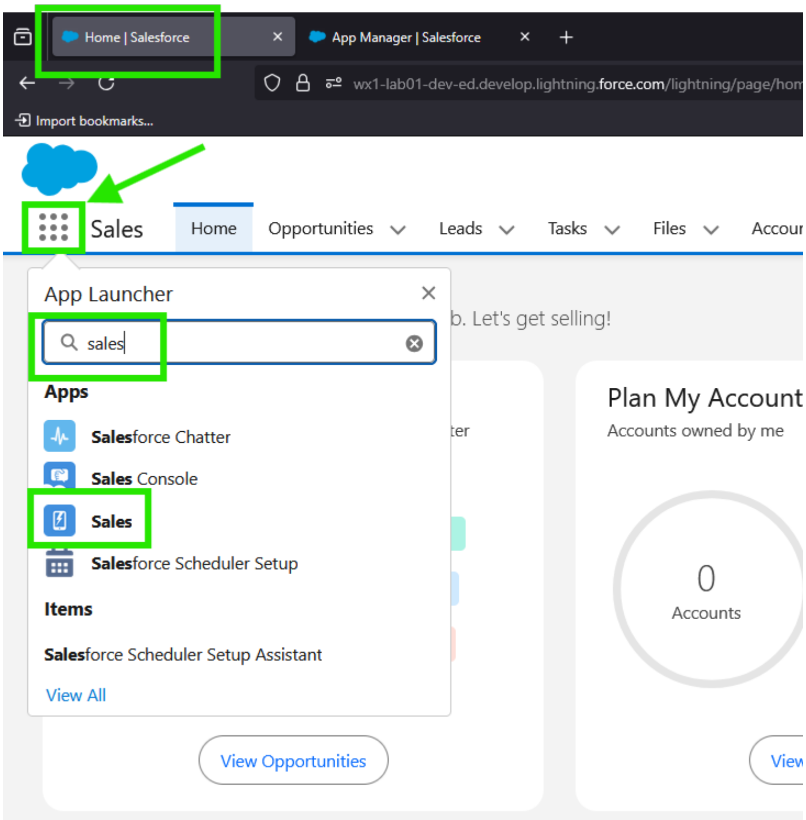
**Attention**

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.



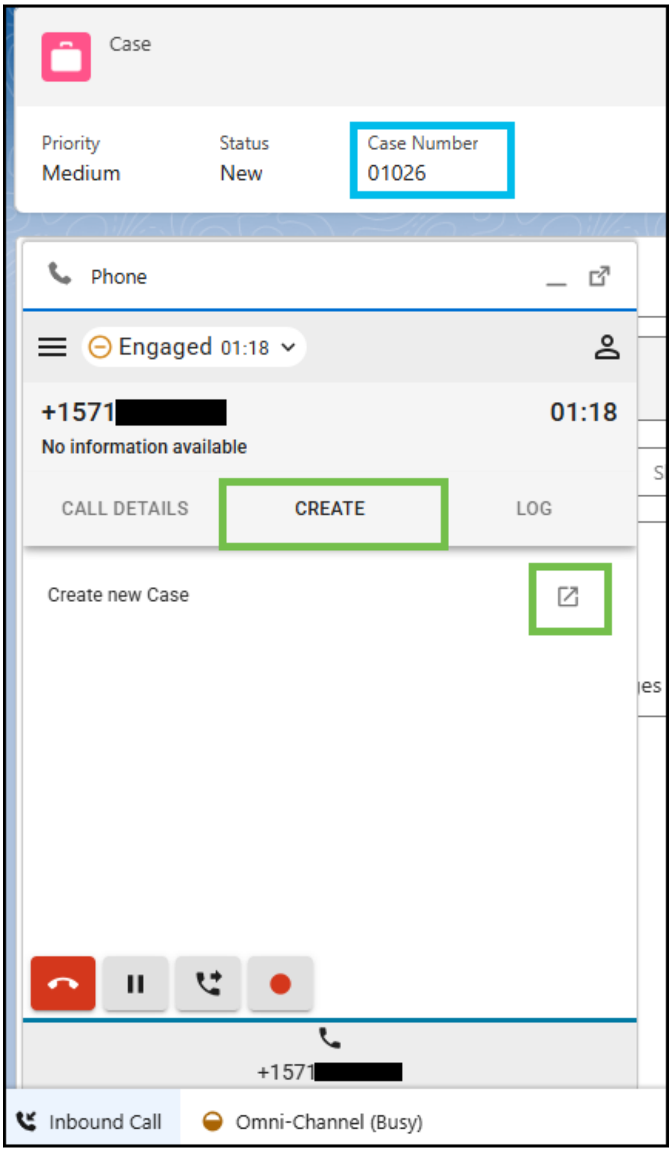

- Open the Webex Contact Center phone widget and login using the selected Webex Contact Center credentials.
- For the team use **Salesforce_Team**.

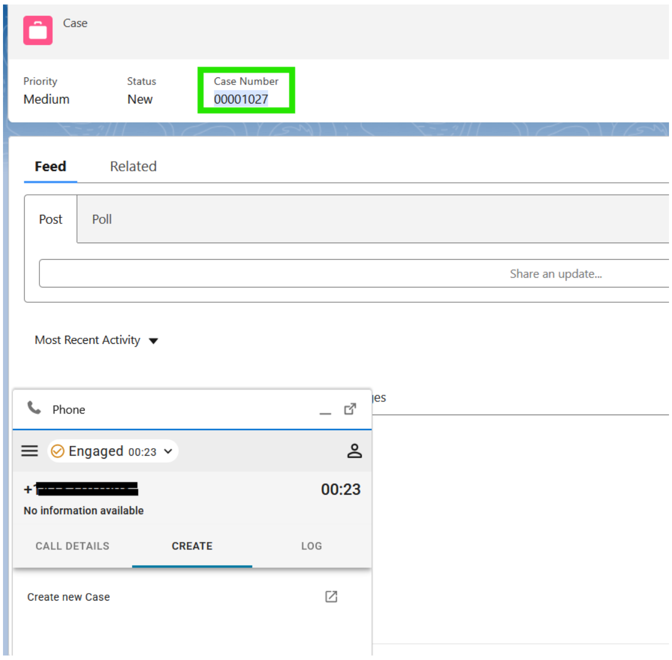
**Reminder**

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

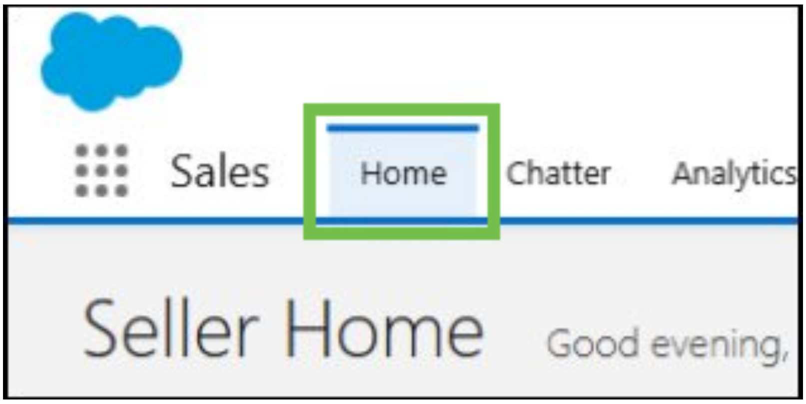
First call interaction:

- 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 selct **Create a new case** (highlitned in green) through the Webex Contact Center widget and note down the **case number** (highlitned 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.

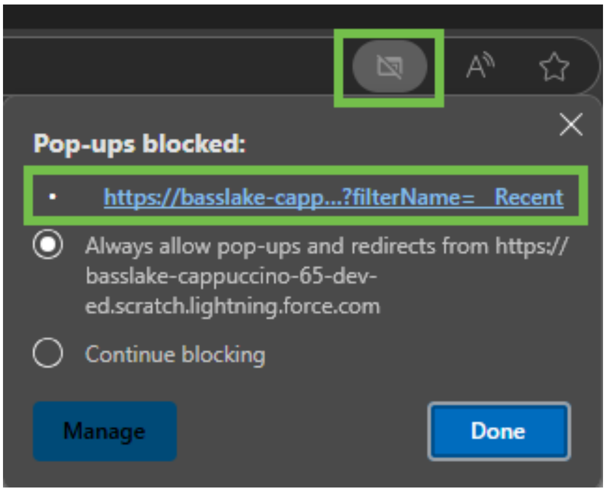


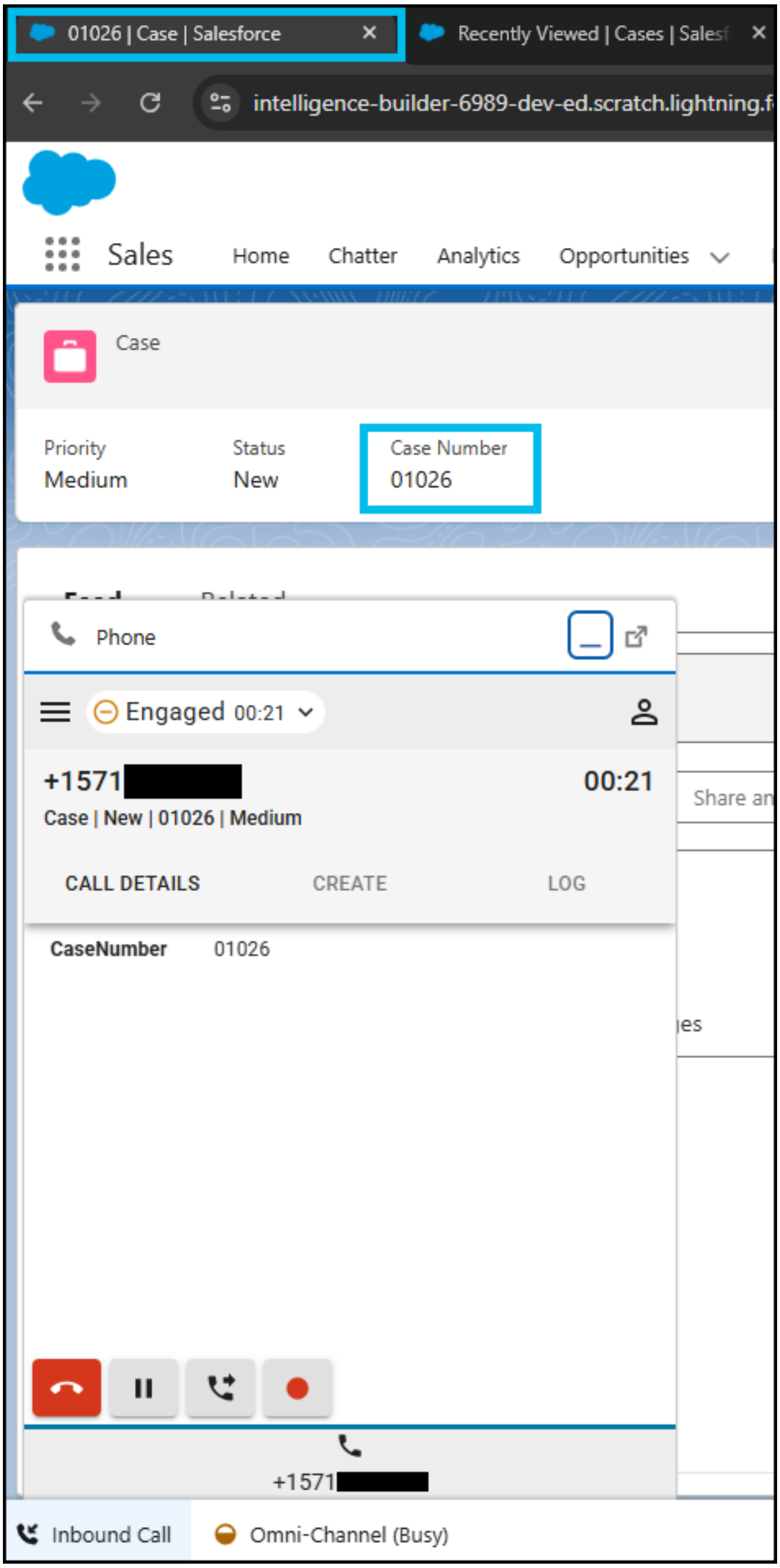
Second call interaction:

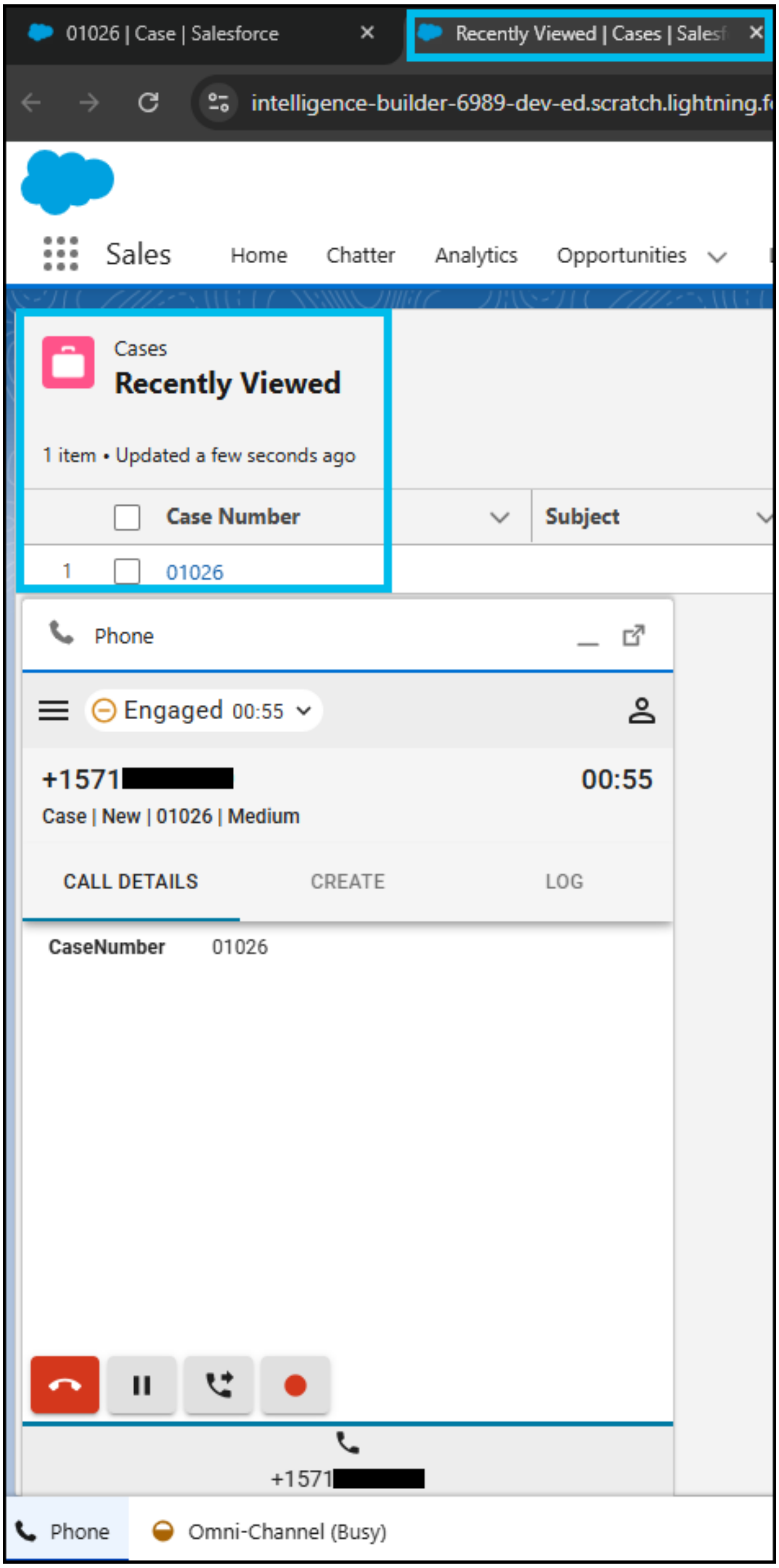
- Make sure that agent state is set to 'Available' and then call the channel number again. In the IVR, choose **Option 5**.
- Provide the case number that was created during the previous call.
- The existing case should be displayed, and the case list should be displayed in a new tab.
- Select the **Phone**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




01026 | Case | Salesforce
Recently Viewed | Cases | Salesf
intelligence-builder-6989-dev-ed.scratch.lightning.f
Sales
Home
Chatter
Analytics
Opportunities
Case
Priority
Medium
Status
New
Case Number
01026
Phone
Engaged 00:21
+1571[redacted]
00:21
Case | New | 01026 | Medium
CALL DETAILS
CREATE
LOG
CaseNumber
01026
+1571[redacted]
Inbound Call
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 Task 6 - Automatic New Case Creation Using Custom CAD Variables

Please use the following credentials to complete the tasks:

| | |
|---|---|
| `Control Hub` | https://admin.webex.com |
| `Salesforce` | https://login.salesforce.com/ |
| `WxCC Username` | labuser**ID**@wx1.wbx.ai 📋 *(where **ID** is your selected pod number (01 through 30); i.e. labuser**02**@wx1.wbx.ai if selected pod is 2)* |
| `WxCC Password` | webexONE1! 📋 |
| `Salesforce Username` | labuser**ID**@wx1.wbx.ai 📋 *(where **ID** is your selected pod number (01 through 30); i.e. labuser**02**@wx1.wbx.ai if selected pod is 2)* |
| `Salesforce Password` | webexONE1! 📋 |

**Info**

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**

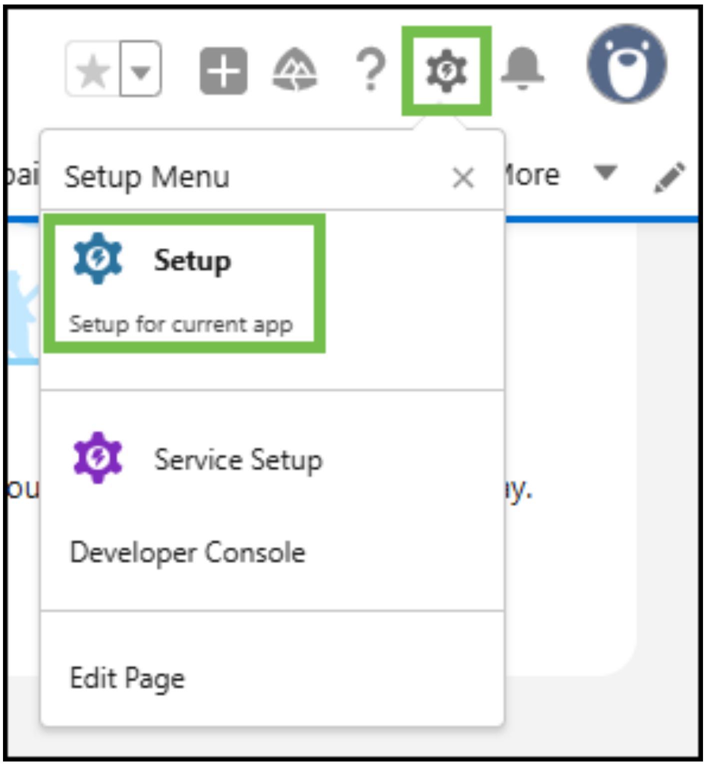
- Enable auto case creation via the Salesforce Call Center configuration file.
- Set up CAD variable field mapping for auto case creation in the Salesforce Call Center settings.
- Test the auto case creation and CAD variable field mapping.

### 1.8.1 Section 1 - Modifying Call Center Options in Salesforce

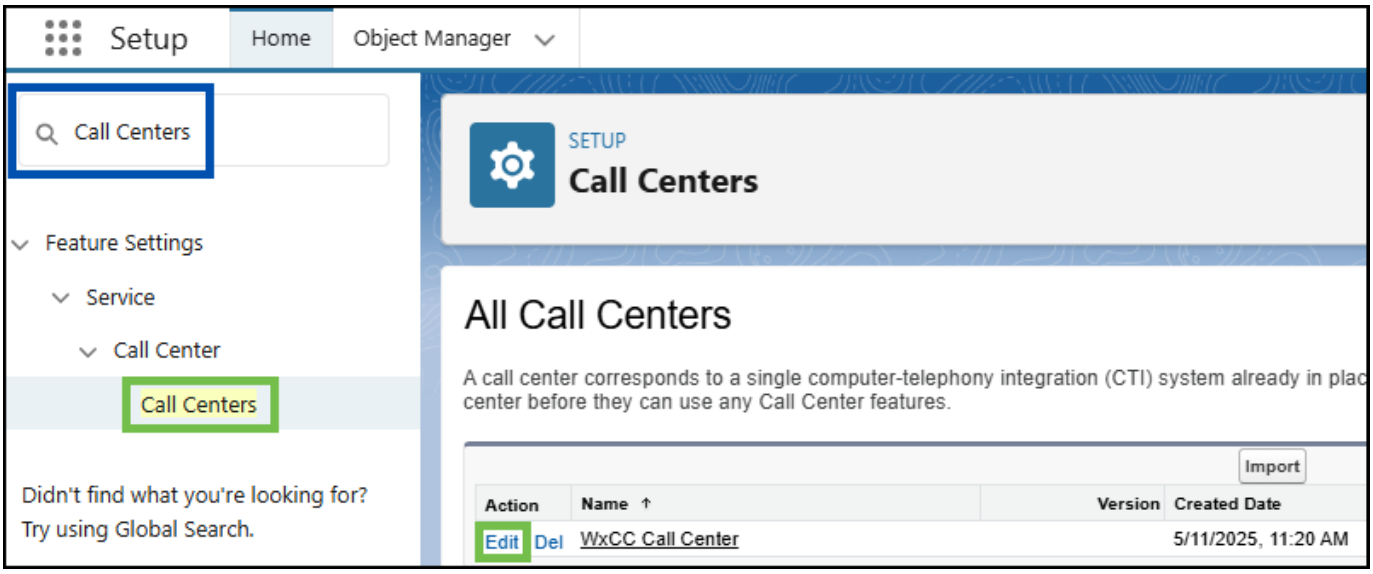
**Attention**

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'**.

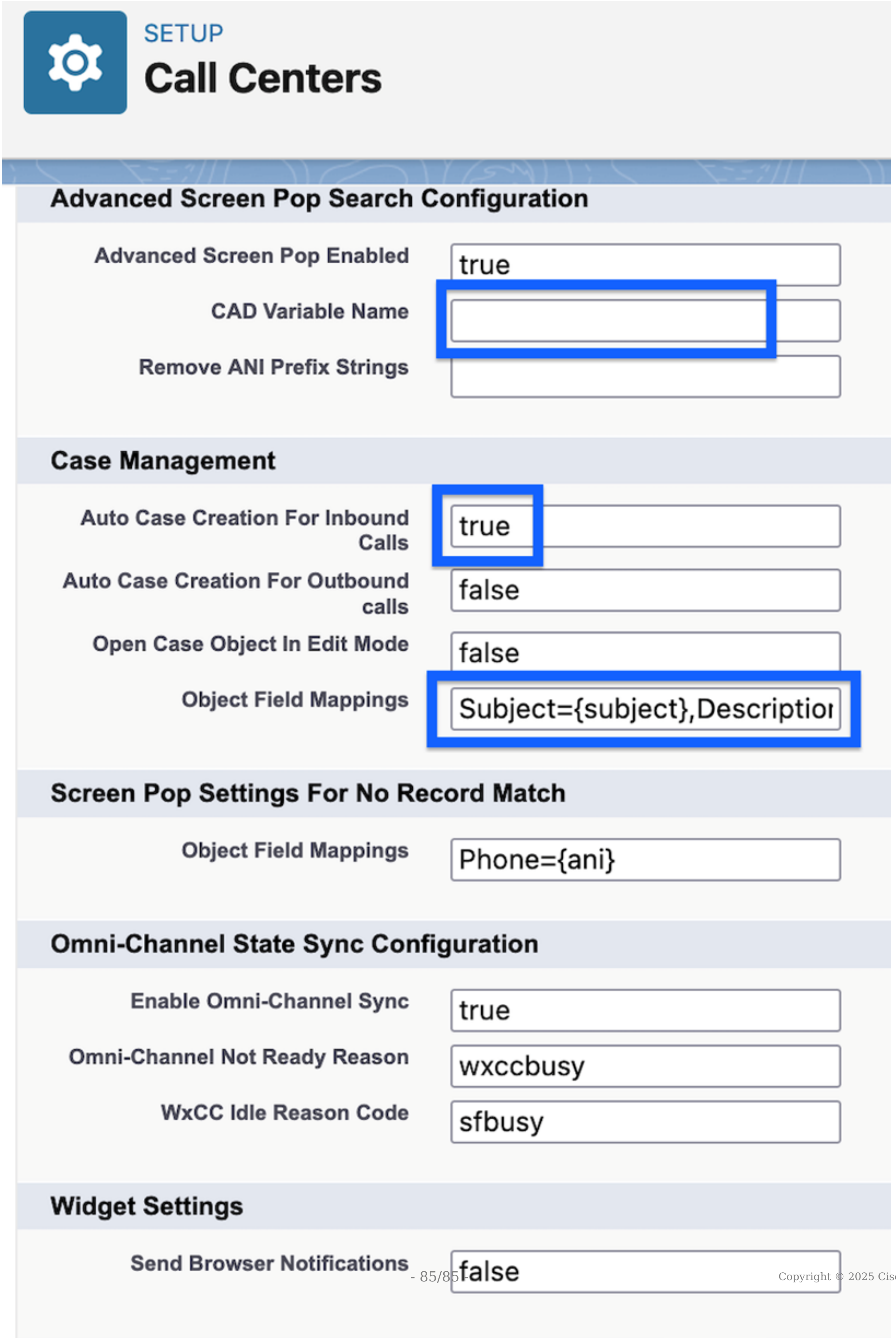



- Go to **'Feature Settings > Service > Call Center > Call Centers'** (or type *Call Centers* in the search bar in the left-hand menu).
- Click **'Edit'** for **'WxCC Call Center'**.




- 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
true
CAD Variable Name
Remove ANI Prefix Strings
Case Management
Auto Case Creation For Inbound Calls
true
Auto Case Creation For Outbound calls
false
Open Case Object In Edit Mode
false
Object Field Mappings
Subject={subject},Descriptio
Screen Pop Settings For No Record Match
Object Field Mappings
Phone={ani}
Omni-Channel State Sync Configuration
Enable Omni-Channel Sync
true
Omni-Channel Not Ready Reason
wxccbusy
WxCC Idle Reason Code
sfbusy
Widget Settings
Send Browser Notifications
false