

LAB-2308

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

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Table of contents

1. Lab	3
1.1 Introduction	3
1.2 Task 0 - Integrate Webex Contact Center with Salesforce Using the Legacy CRM Connector	4
1.3 Task 1 - Integrate Webex Contact Center with Salesforce Using the New CRM Connector	18
1.4 Task 2 - Integrate Salesforce Connector with WebRTC	32
1.5 Task 3 - Presence Synchronization Between Salesforce and Webex Contact Center	46
1.6 Task 4 - Data Lookup Using CAD Variables	62
1.7 Task 5 - Case Lookup Using Custom CAD Variables and Agent Desktop Screen Pop	75
1.8 Task 6 - Automatic New Case Creation Using Custom CAD Variables	83

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	<a "="" >https:="" article="" en-us="" help.webex.com="" href="https://login.salesforce.com" integrate-webex-contact-center-with-salesforce-(version-1%e2%80%94legacy)#concept-template_ac93b49e-a5eb-4942-a734-26c8da471aae="" nhxw7kfb="" target="_blank">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/
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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

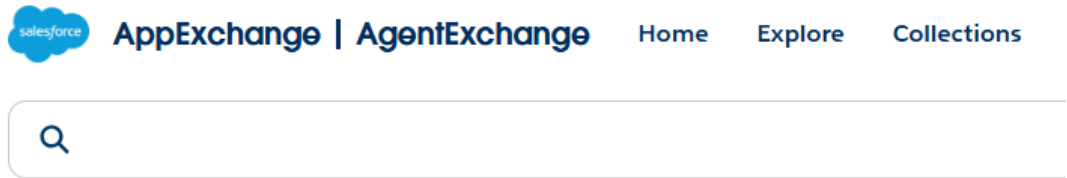
Trial account only expires if its not logged in atleast once in 45 days.

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.



Try apps and solutions more easily using the redesigned, simpler trial experience. Start a sandbox instance. [Learn More](#)

Webex Contact Center CTI Connector for Salesforce

By Cisco Systems, Inc

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

Salesforce App
No Ratings
❤️

Paid Add-On Required
 Payment required for external services or products
[Pricing Details](#)

Get It Now

Try It

Business Need
 Telephony

Cisco's open platform and architecture enable partners to build and connect their contact center to the business.

- 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**').

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

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

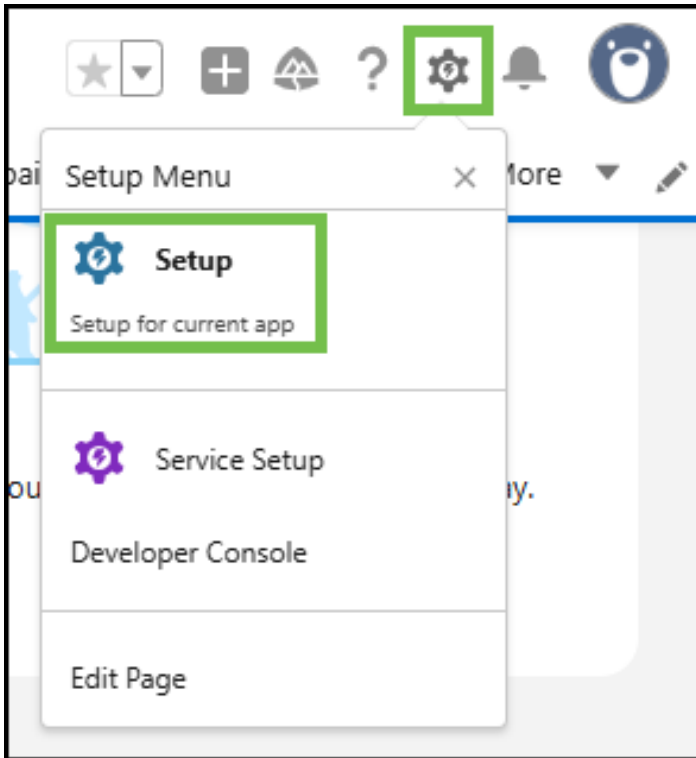
50 lines (50 loc)...

Code Blame Raw

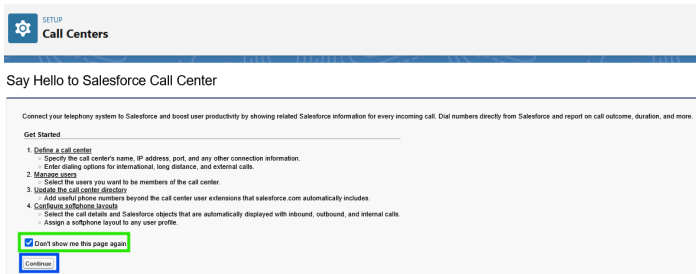
```

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 top navigation bar, 'Setup' is selected. The left sidebar shows a search bar with 'call center' entered and a navigation menu with 'Feature Settings', 'Service', and 'Call Center' expanded. Under 'Call Center', 'Call Centers' is highlighted. The main content area is titled 'Call Centers' and contains a table with columns 'Name', 'Version', 'Created Date', and 'Last Modified Date'. The table is currently empty, and an 'Import' button is highlighted above it.

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, "CiscoPCC

The screenshot shows the 'New Call Center Import Information' dialog box. It has 'Import' and 'Cancel' buttons at the top. The main section is titled 'New Call Center Import Information' and contains a field for 'Call Center Definition File' with the value 'OpenCTI.callCenter-meta.xml'. A green box highlights the 'Browse...' button next to the field, with a green arrow pointing to it. Another green box highlights the 'Import' button at the bottom, with a green arrow pointing to it.

- 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

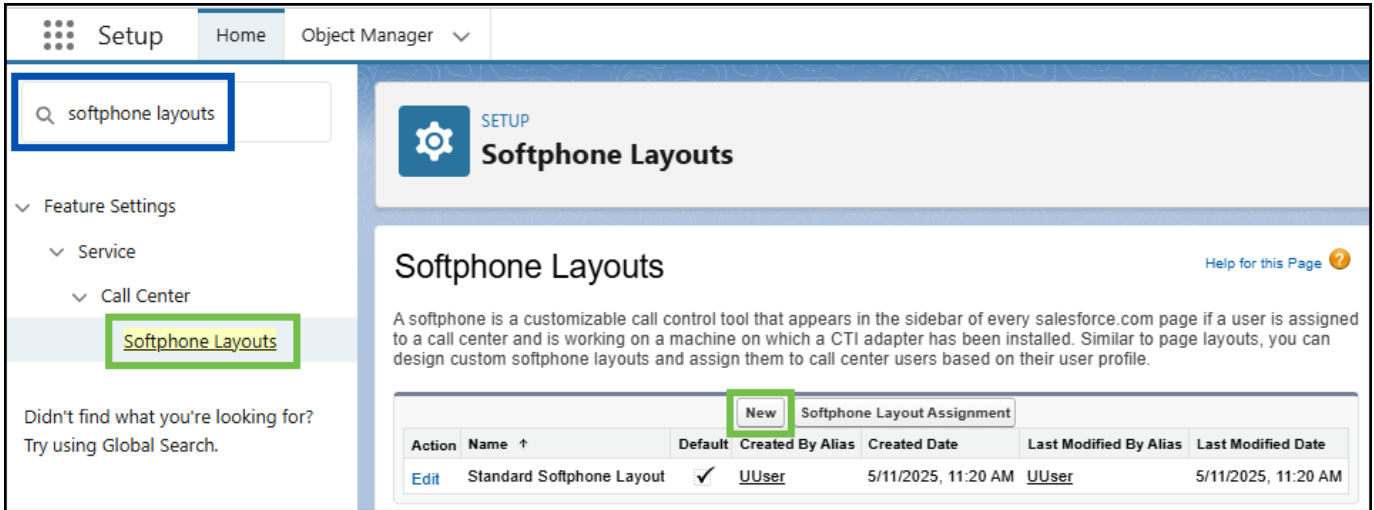
Find

Add to Call Center [Cancel](#)

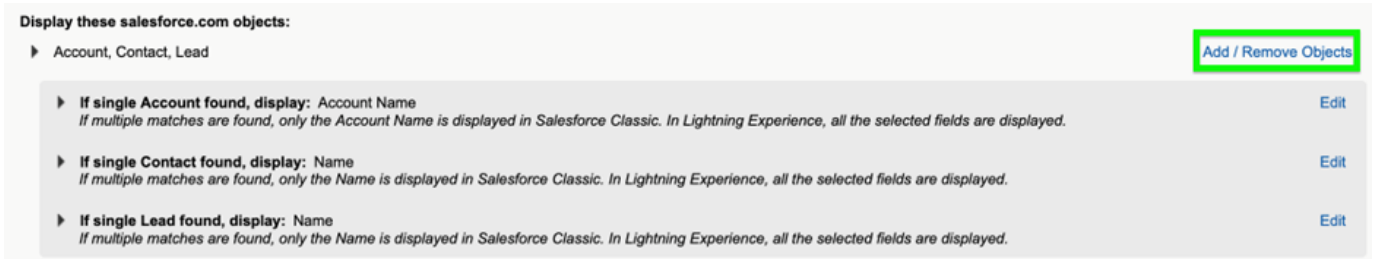
<input type="checkbox"/>	Full Name	Alias	Username	Role	Profile
<input type="checkbox"/>	User_Integration	integ	integration@00das00000oznibmac.com		Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00das00000oznibmac.com		Analytics Cloud Security User
<input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

1.2.3 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'.



SETUP
Softphone Layouts

Save Cancel

Name Is Default Layout

Select Call Type **Inbound** ▾

Softphone Layout [Help about this section ?](#)

Display these call-related fields:
▶ Caller ID, Dialed Number [Edit](#)

Display these salesforce.com objects:
▼ Account, Contact, Lead, Case [Collapse](#)

Available	Selections
Campaign ▲	Account ▲
Event	Contact
Opportunity	Lead
Opportunity (Historical)	Case
Resource Preference	
Return Order	
Return Order Line Item	
Service Appointment	
Shift	
Shipment	
Task	
User	
Work Order	
Work Order Line Item ▼	

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

Screen Pop Settings [Help about this section ?](#)

▶ Screen pops open within: Existing browser window [Edit](#)

▼ No matching records: Pop to new Contact [Collapse](#)

Don't pop any screen
 Pop to new ▾
 Pop to Visualforce page
 Pop to flow ▾

▶ Single-matching record: Pop detail page [Edit](#)

▶ Multiple-matching records: Don't pop any screen [Edit](#)

Note

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

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

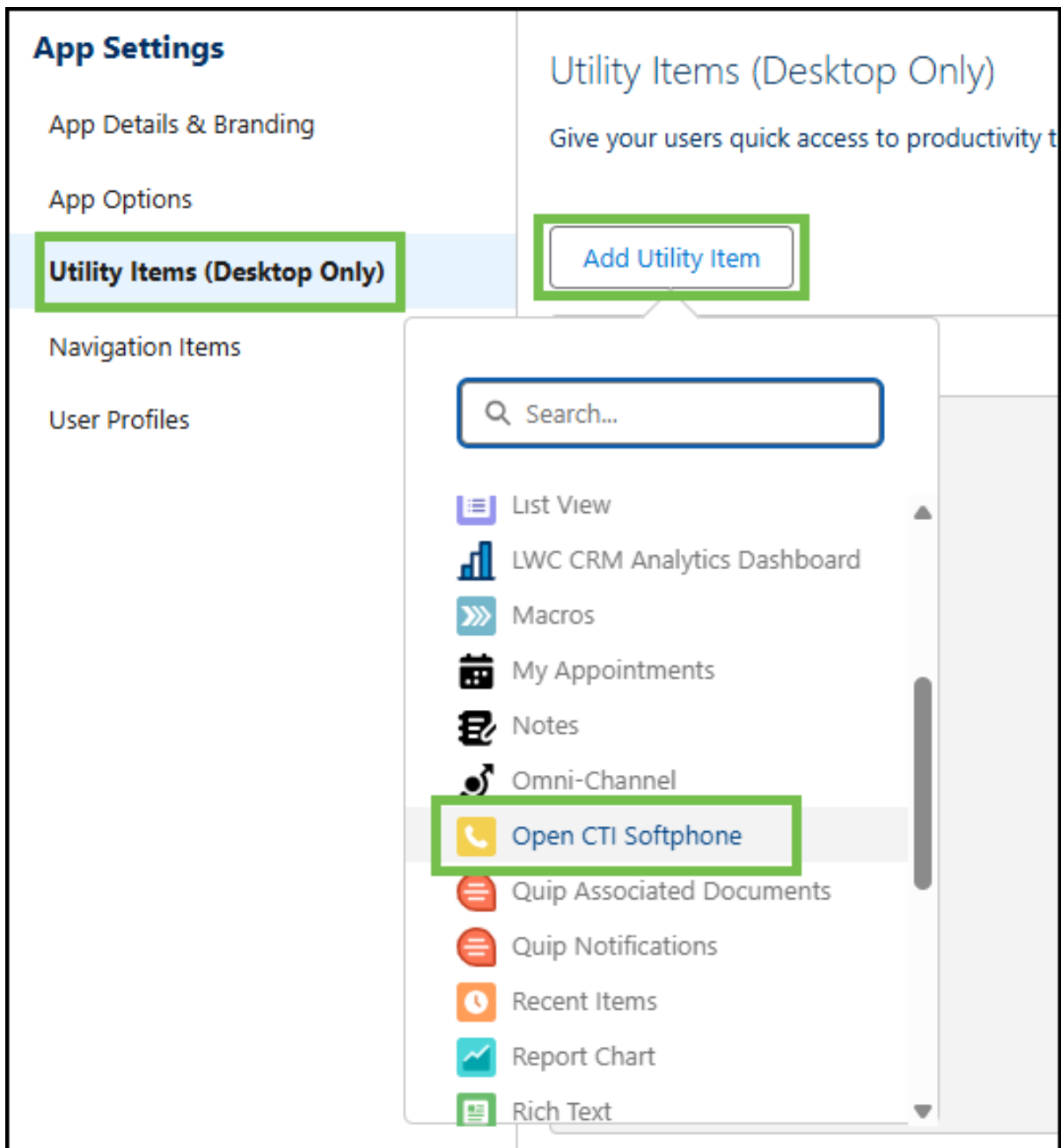
1.2.4 Section 3 - Configure CTI Softphone

- 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.

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar has a search bar containing 'App Manager' and a list of apps under 'Apps', with 'App Manager' selected. The main content area shows a table of 26 items, sorted by App Name. The table has columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The 'Sales' app (line 18) is highlighted with a red box, and its 'Edit' button is also highlighted with a red box.

App Name ↑	Developer Name	Description	Last Modified	App Type	Visibility
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	✓
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'**.



- 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)', '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 a search bar and a list of utility items: 'Macros', 'My Appointments', 'Notes', 'Omni-Channel', 'Open CTI Softphone', 'Quip Associated Documents', 'Quip Notifications', 'Recent Items', 'Report Chart', 'Rich Text', and 'runtime_cdp:dataModelTab'. The 'Omni-Channel' item is highlighted in green. To the right of the list is a 'Utility Bar Alignment' dropdown set to 'Default'. Below the list is a 'PROPERTIES' section for 'Open CTI Softphone' with the following settings: 'Label' (Phone), 'Icon' (call), 'Panel Width' (340), 'Panel Height' (480), and 'Start automatically' (checked).

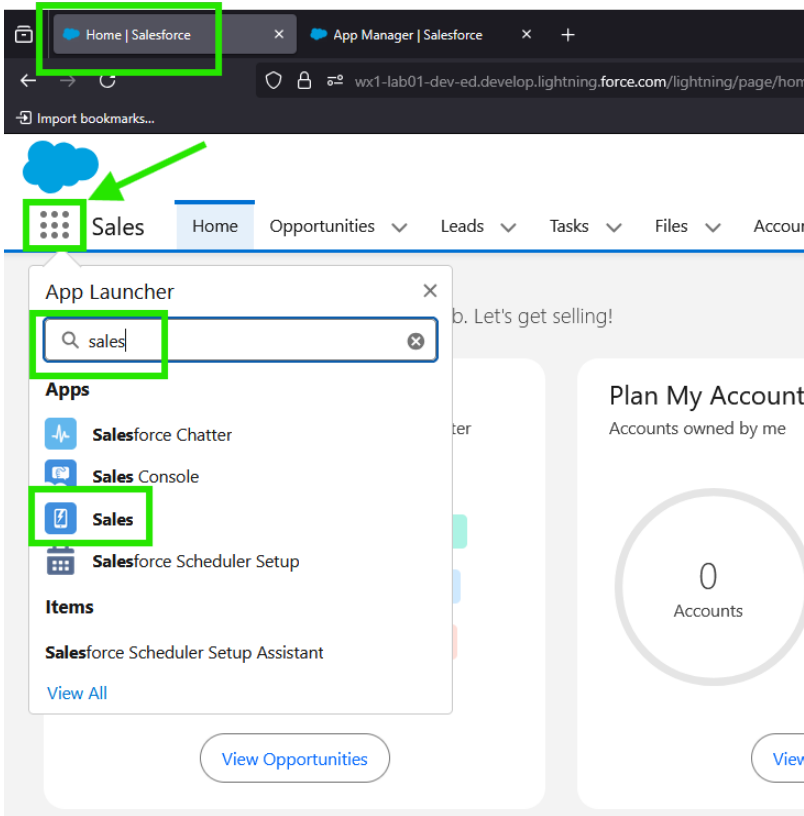
- Click '**Save**' and return to the previous page by clicking the back arrow icon at the top left corner.

1.2.5 Section 4 - Testing

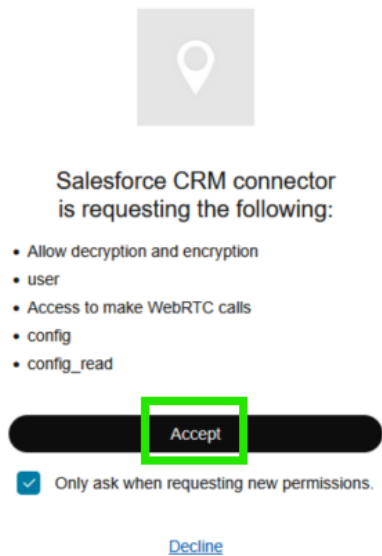
Attention

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

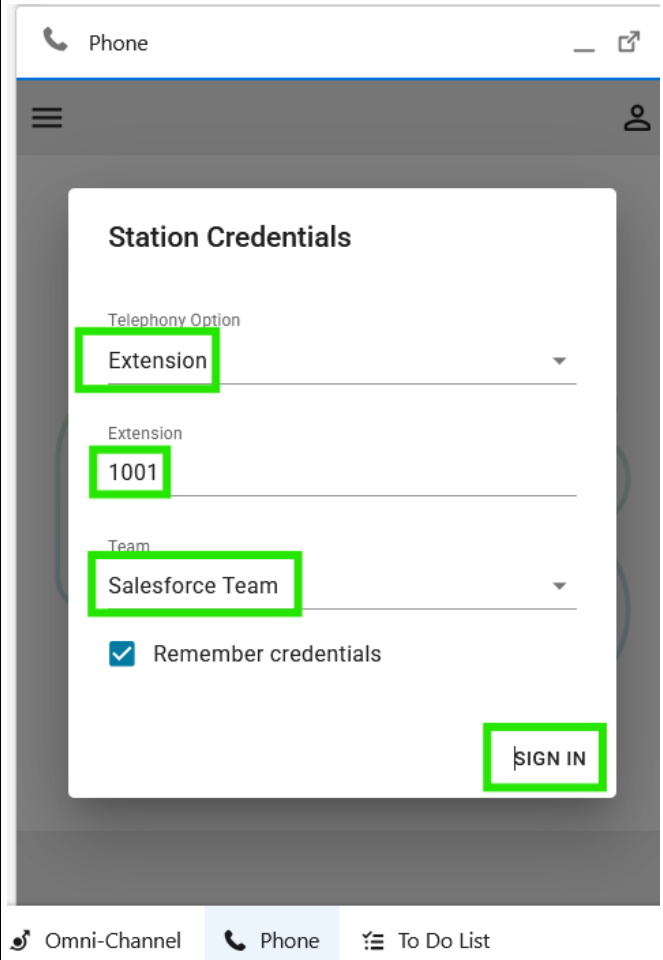
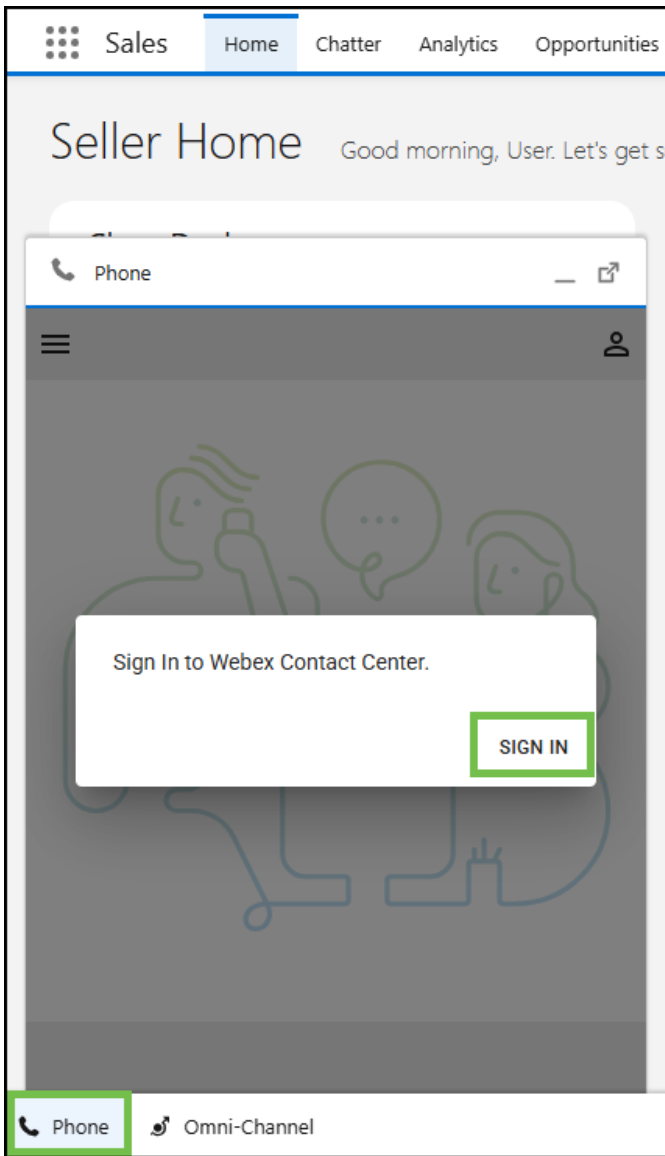
- From the Salesforce Home page, click on the '**App Launcher**' icon (top left).
- Search for *Sales* and click on the '**Sales**' option.

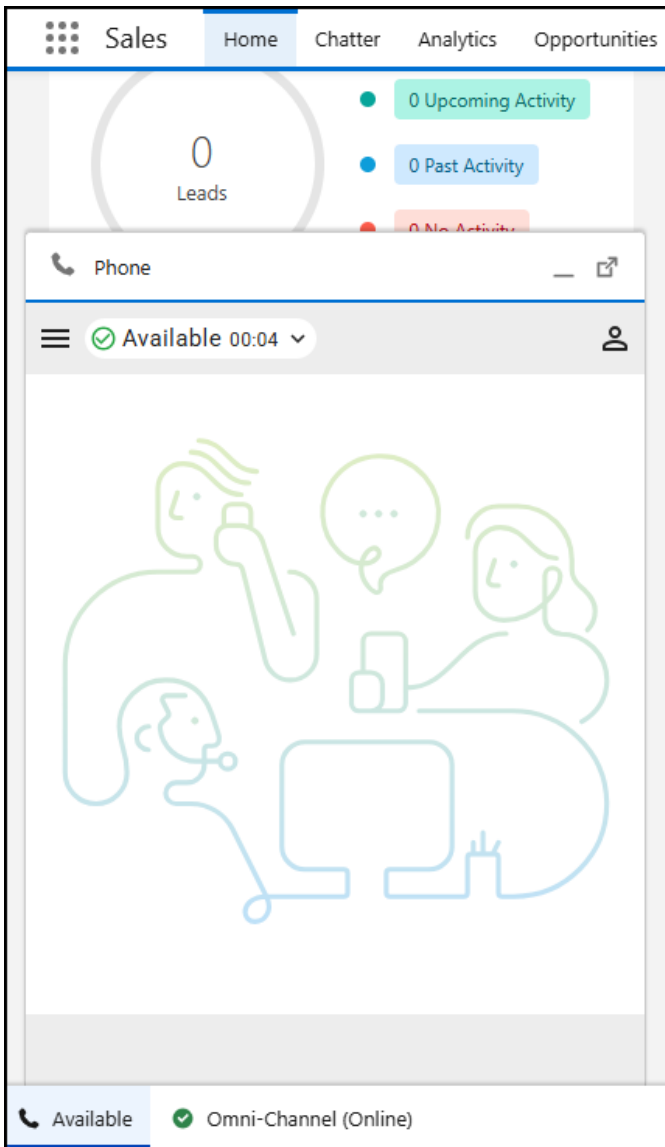


- Open the Webex Contact Center phone widget (bottom left) and login to Webex Contact Center Agent Desktop using the selected Webex Contact Center user credentials (e.g., *labuserID@wx1.wbx.ai*):
- First time login into agent desktop could prompt you the OAuth2 Consent as shown in the first screenshot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



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





- 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:

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.

1.3.1 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 atleast once in 45 days.

1.3.2 Section 1 - Configure Call Center

Attention

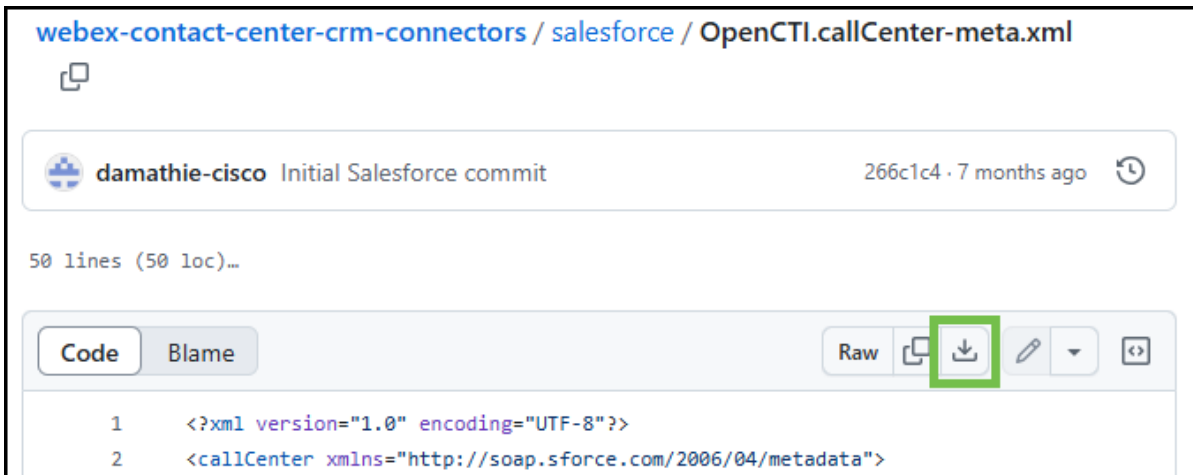
Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

- 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**').



webex-contact-center-crm-connectors / salesforce / OpenCTI.callCenter-meta.xml

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

50 lines (50 loc)...

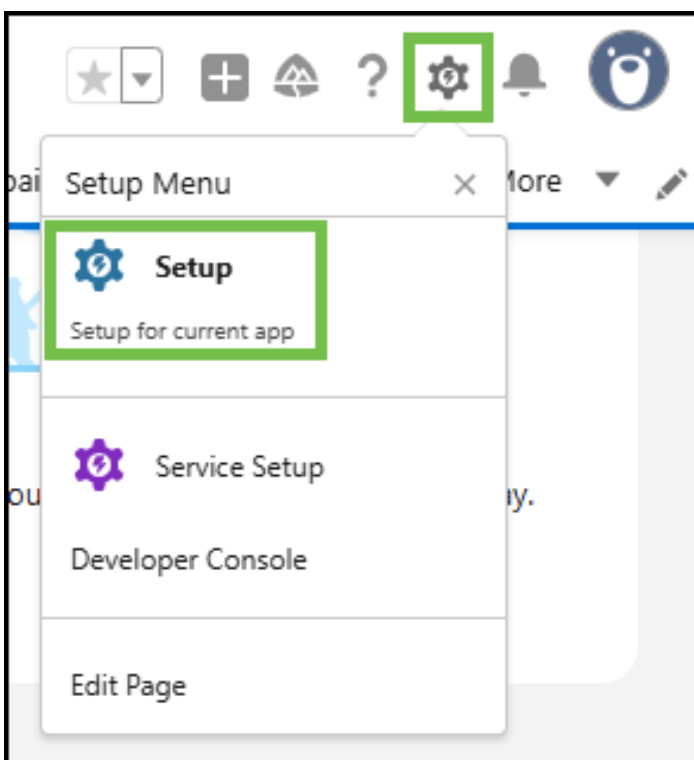
Code Blame Raw Copy Download Edit

```

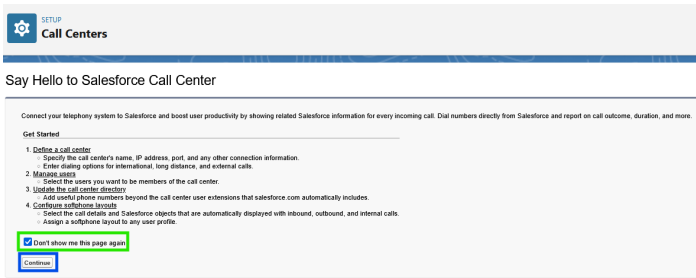
1 <?xml version="1.0" encoding="UTF-8"?>
2 <callCenter xmlns="http://soap.sforce.com/2006/04/metadata">

```

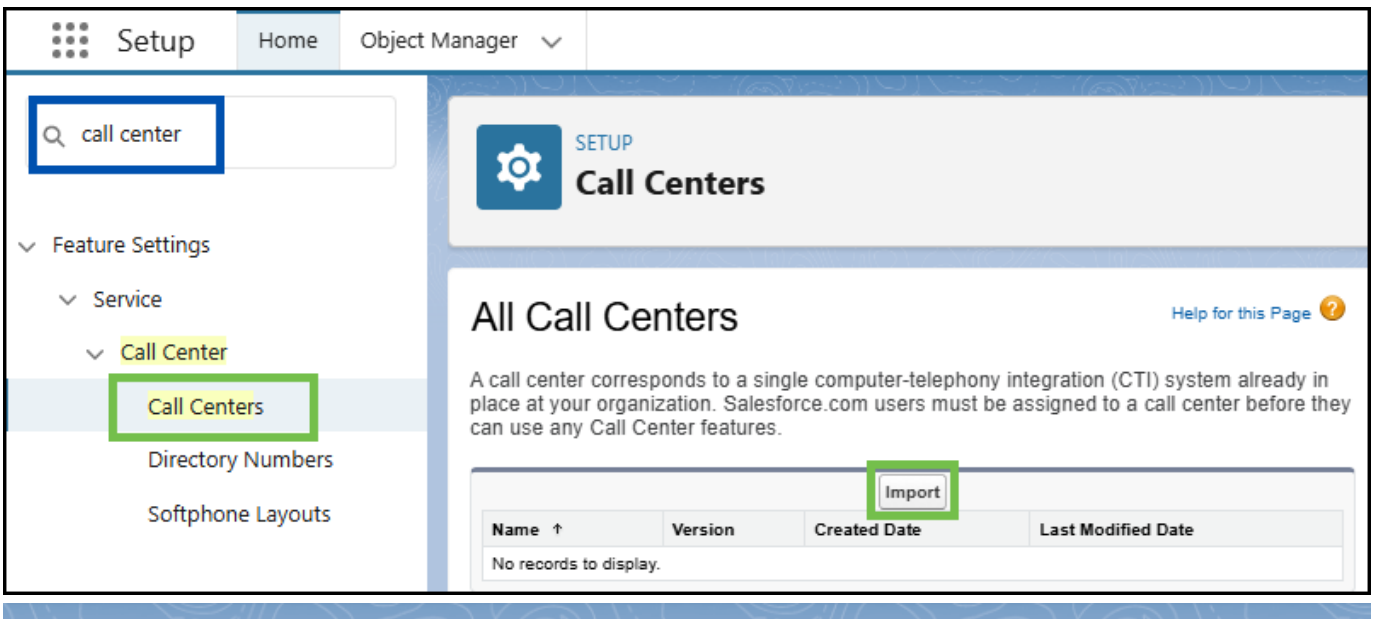
- In Salesforce, navigate to '**Setup**' by clicking the gear icon in the top-right corner and selecting '**Setup**'.



- 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**.

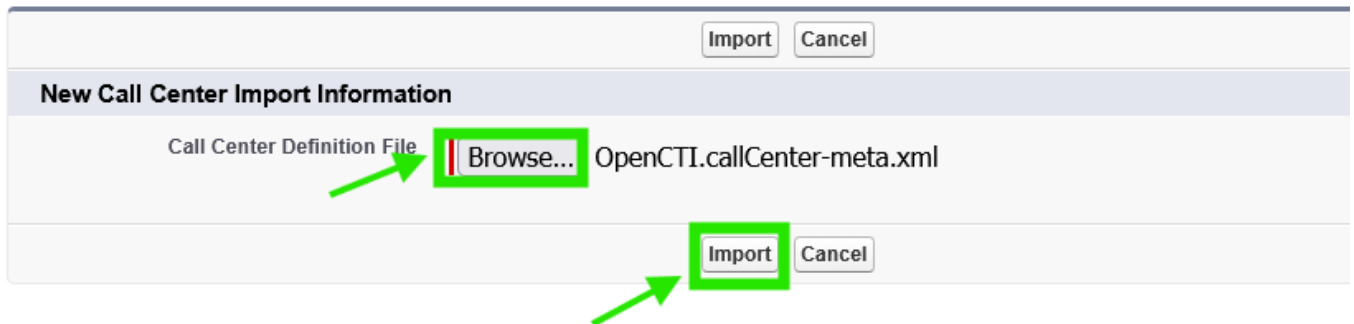


- Click **'Import'**, select **'Browse'** and choose the call center definition file (downloaded earlier).
- Click **'Import'** again to save the added file.



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 installation directory, and is typically named after the type of CTI system that the adapter supports (for example, "CiscoIPCC



- 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

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

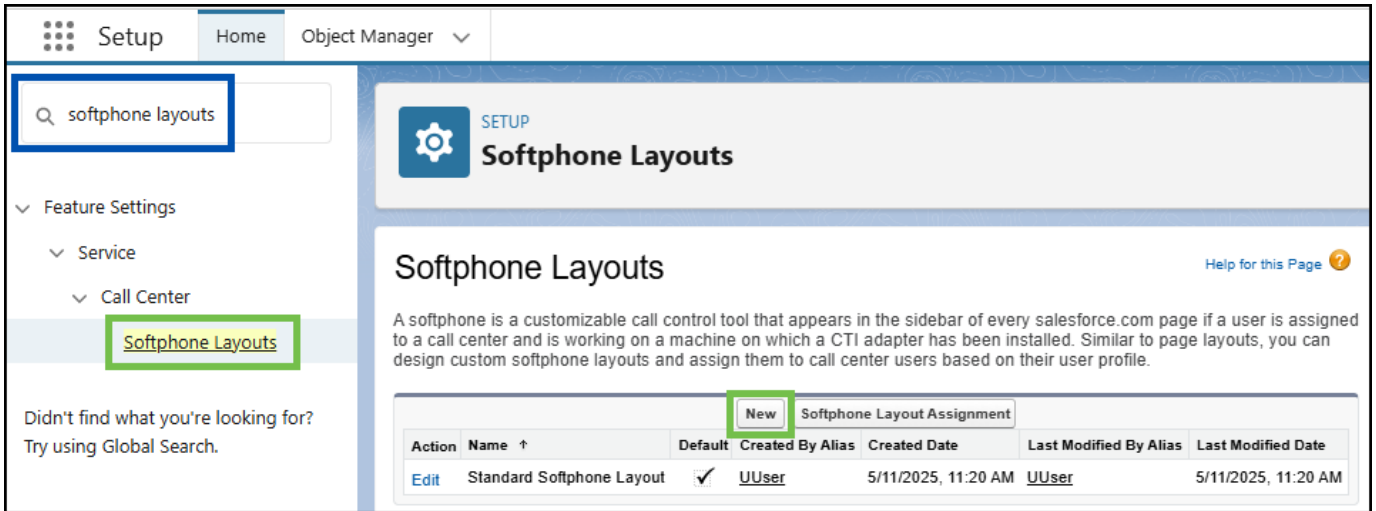
Find

Add to Call Center
Cancel

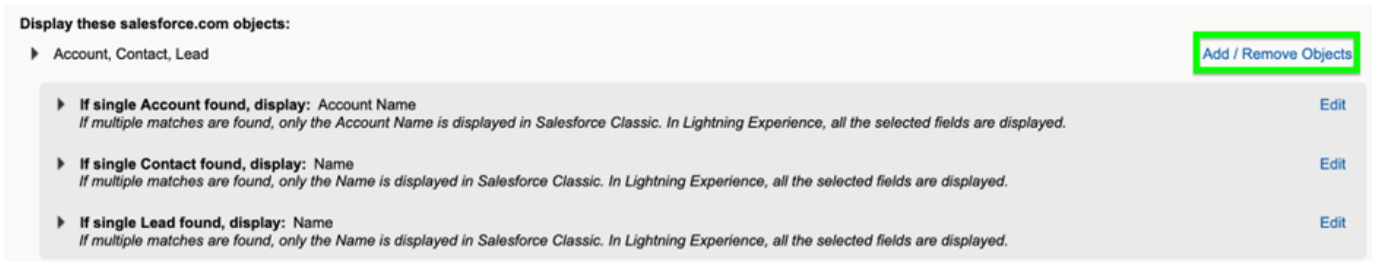
<input type="checkbox"/>	Full Name	Alias	Username	Role	Profile
<input type="checkbox"/>	User_Integration	integ	integration@00das00000oznibmac.com		Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00das00000oznibmac.com		Analytics Cloud Security User
<input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

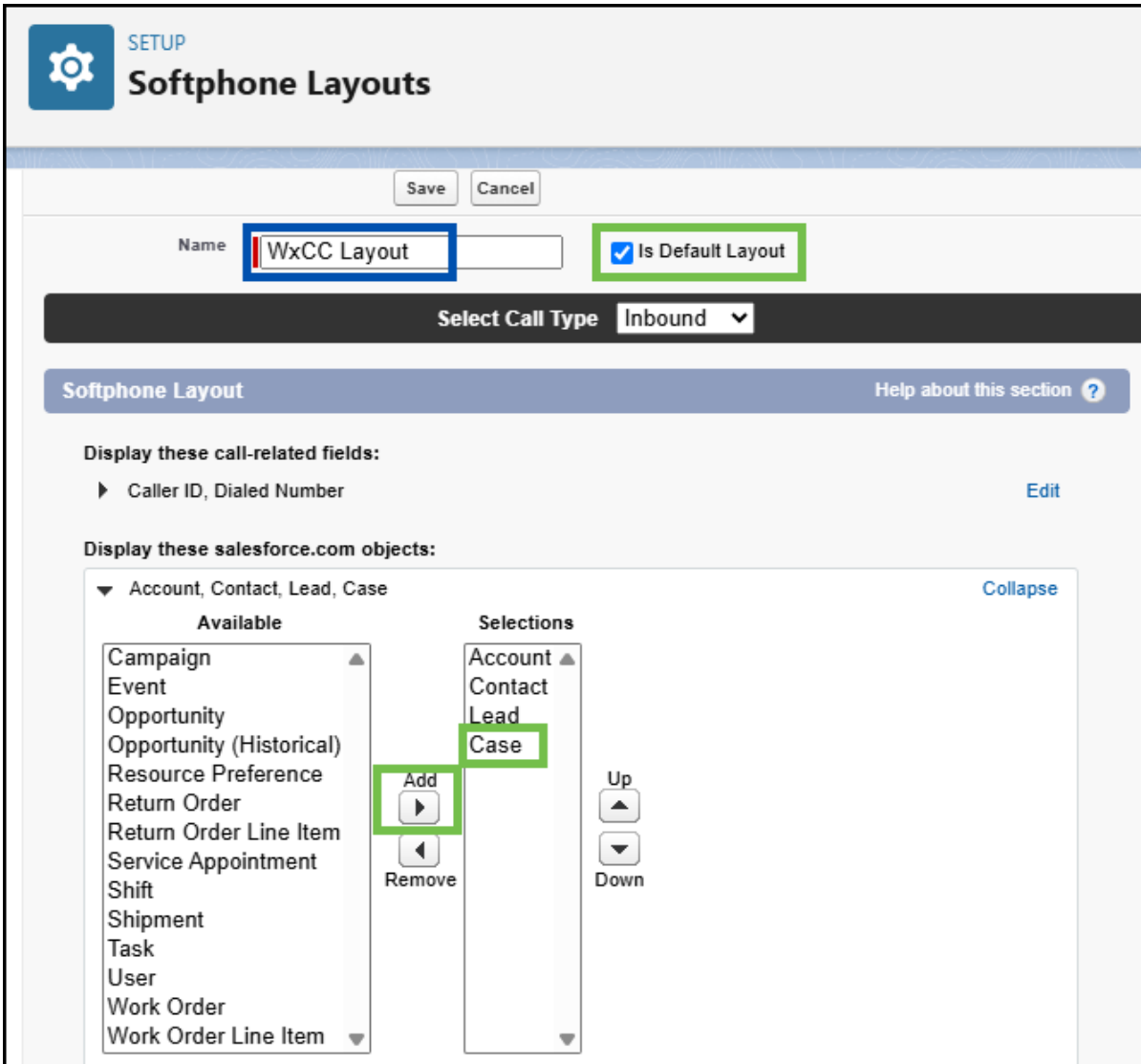
1.3.3 Section 2 - Configure Softphone Layout

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

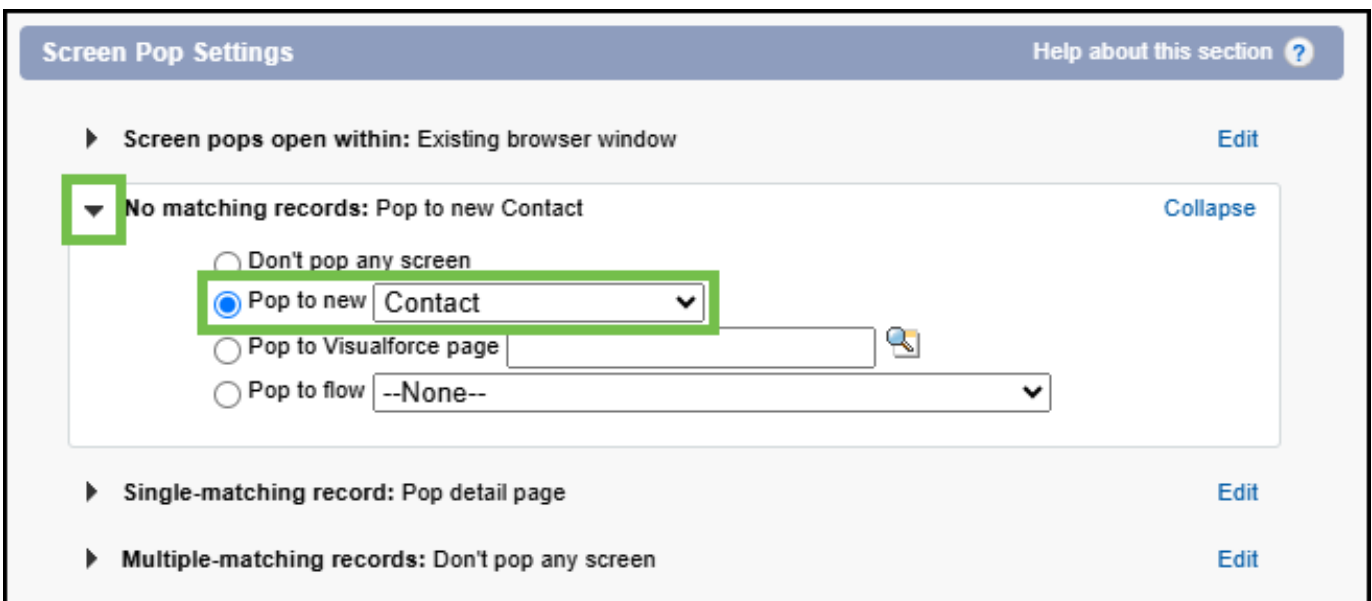


- Provide a name for the '**Softphone Layout**' (e.g., *WxCC layout*).
- Select the '**Is Default Layout**' checkbox.
- Under '**Display these salesforce.com objects**', click on '**Add/Remove Objects**' and add 'Case'.





- 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.

1.3.4 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.

The screenshot shows the Salesforce App Manager interface. The left sidebar has a search bar containing 'App Manager' and a list of apps with 'App Manager' selected. The main content area shows a table of 26 apps. The 'Sales' app (line 18) is highlighted with a red box, and its 'Edit' button is also highlighted with a red box.

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	✓
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)

Give your users quick access to productivity t

Add Utility Item

Navigation Items

User Profiles

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)', '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.' A green box highlights the 'Add Utility Item' button. A dropdown menu is open, showing a search bar and a list of utility items: 'Macros', 'My Appointments', 'Notes', 'Omni-Channel', 'Open CTI Softphone', 'Quip Associated Documents', 'Quip Notifications', 'Recent Items', 'Report Chart', 'Rich Text', and 'runtime_cdp:dataModelTab'. The 'Omni-Channel' item is highlighted with a green box. To the right, the 'Utility Bar Alignment' is set to 'Default'. The 'PROPERTIES' section for 'Open CTI Softphone' includes 'Utility Item Properties' with the following settings: '*Label' is 'Phone', 'Icon' is 'call', 'Panel Width' is 340, 'Panel Height' is 480, and 'Start automatically' is checked.

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

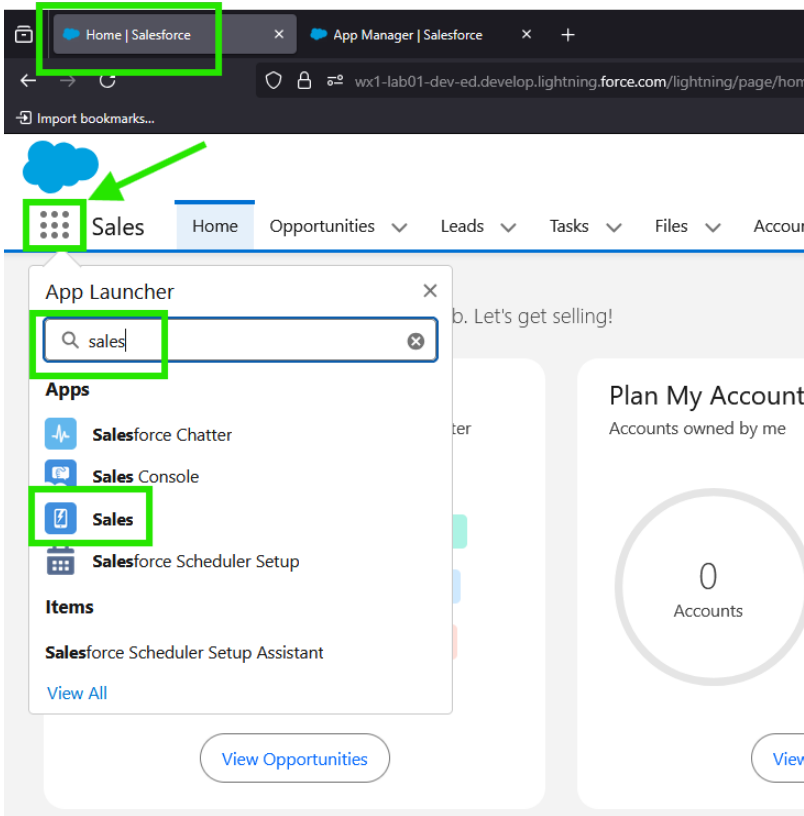
The screenshot shows the Salesforce Lightning App Builder interface. The top navigation bar includes a back arrow, 'Lightning App Builder', 'App Settings', 'Pages', and 'Sales'. The left sidebar shows 'App Settings' with sub-items: 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'Utility Items (Desktop Only)' and contains an 'Add Utility Item' button, a list of utility items including 'Omni-Channel', 'Phone', and 'To Do List', and a 'Utility Bar Alignment' dropdown. A green box highlights the 'Lightning App Builder' icon and a green arrow points to the 'App Settings' header.

1.3.5 Section 4 - Testing

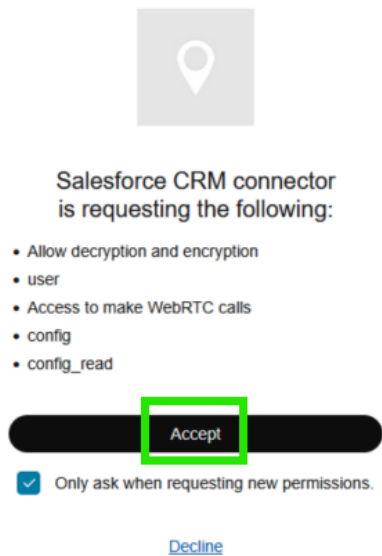
Attention

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

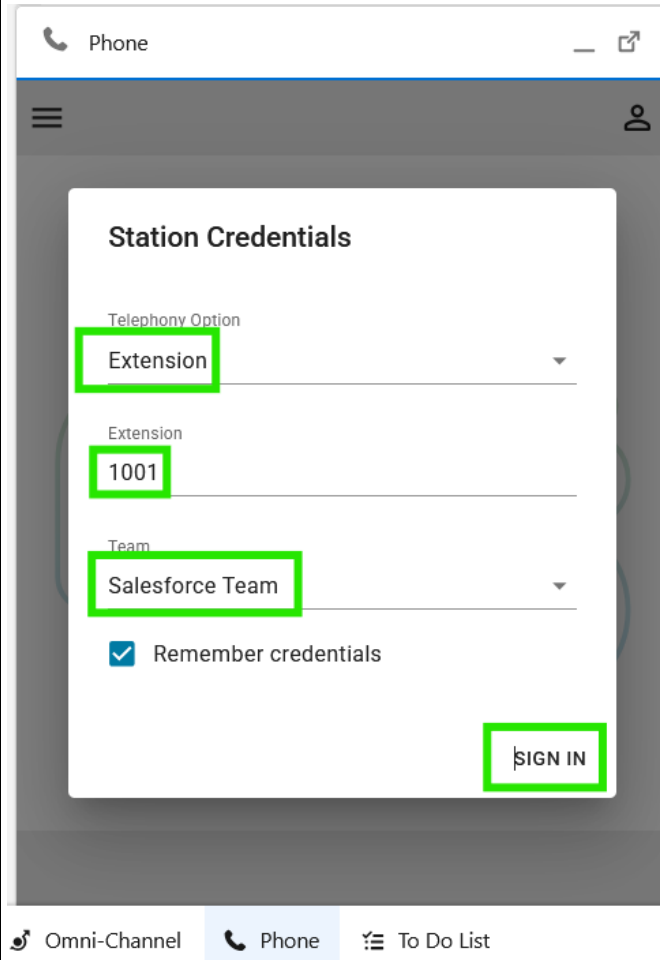
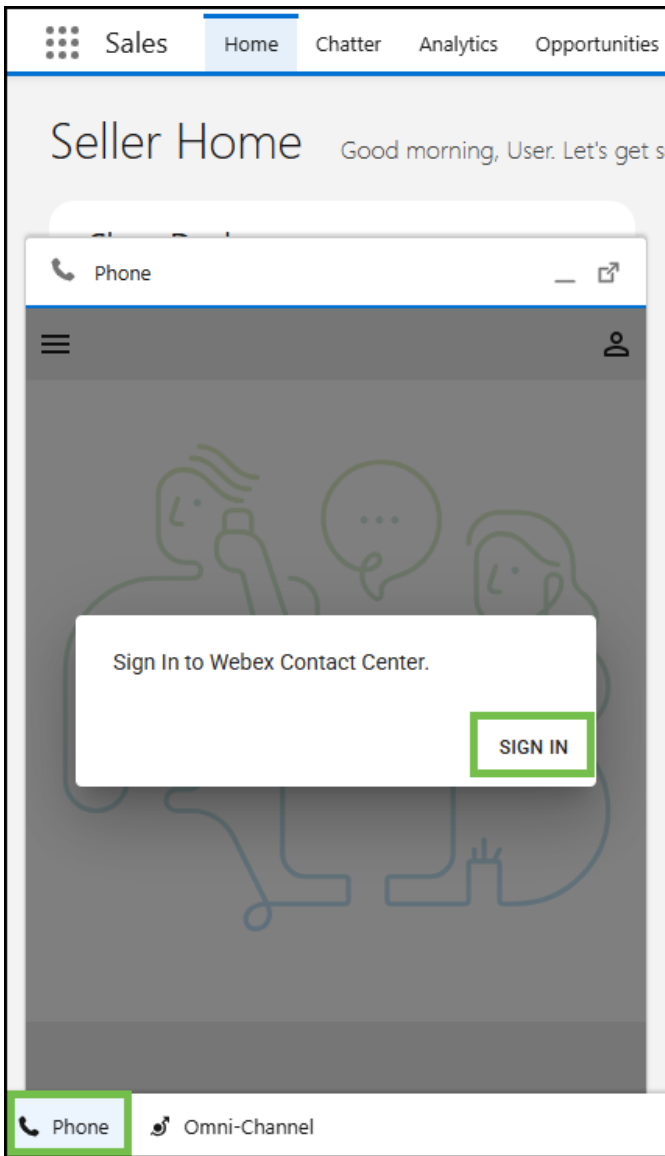
- From the Salesforce Home page, click on the '**App Launcher**' icon (top left).
- Search for *Sales* and click on the '**Sales**' option.

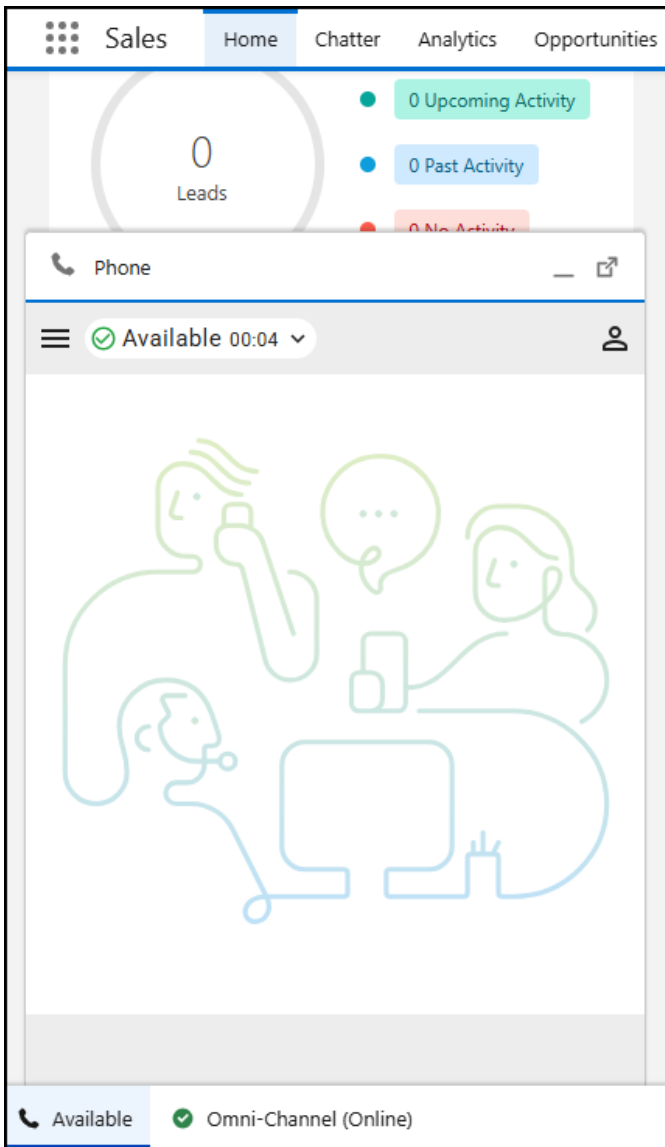


- Open the Webex Contact Center phone widget (bottom left) and login to Webex Contact Center Agent Desktop using the selected Webex Contact Center user credentials (e.g., *labuserID@wx1.wbx.ai*):
- First time login into agent desktop could prompt you the OAuth2 Consent as shown in the first screenshot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



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









- 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

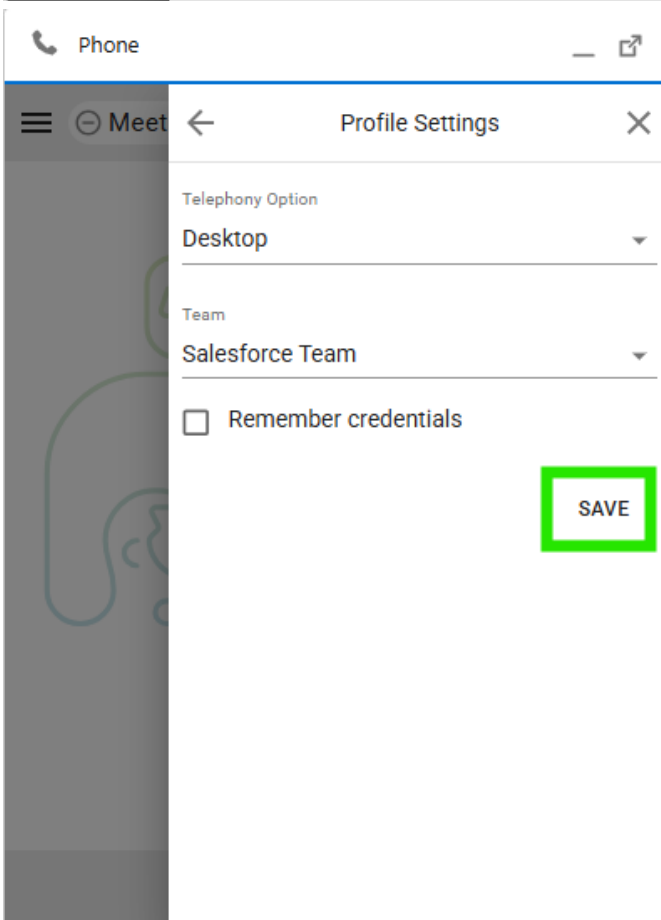
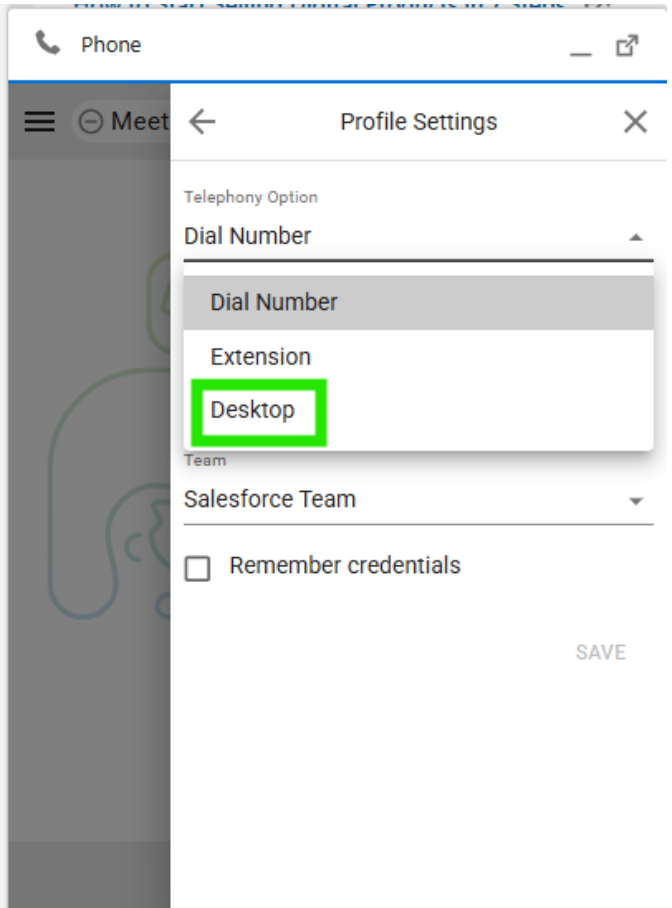
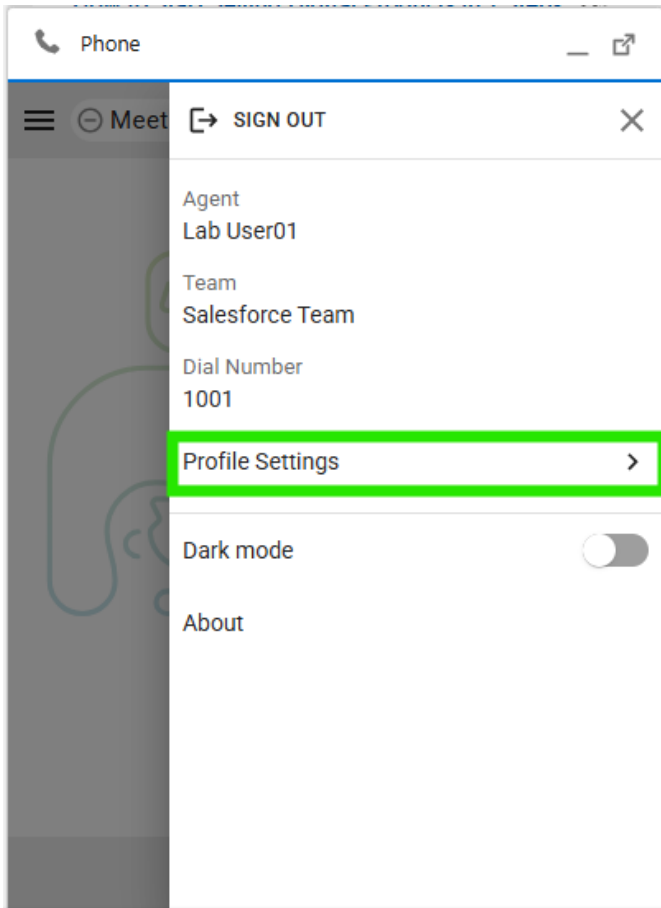
Attention

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

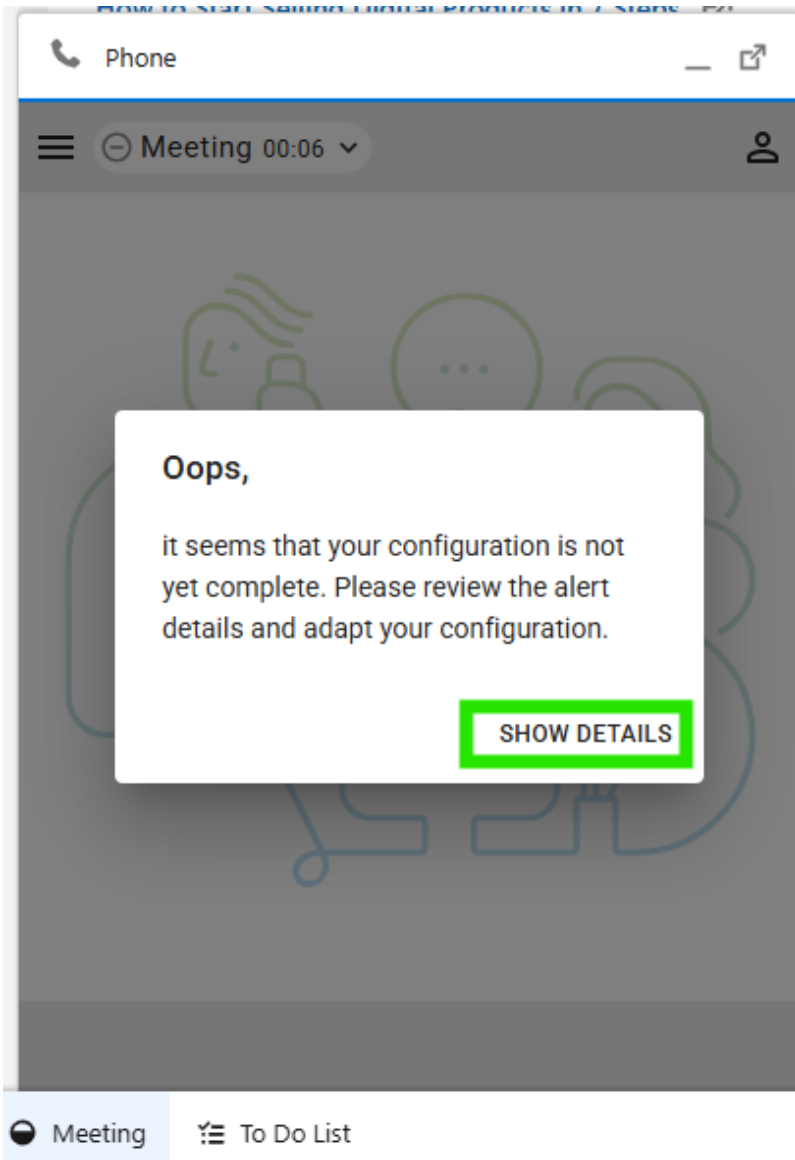
- Navigate to Agent Desktop and select the Avatar on the top right

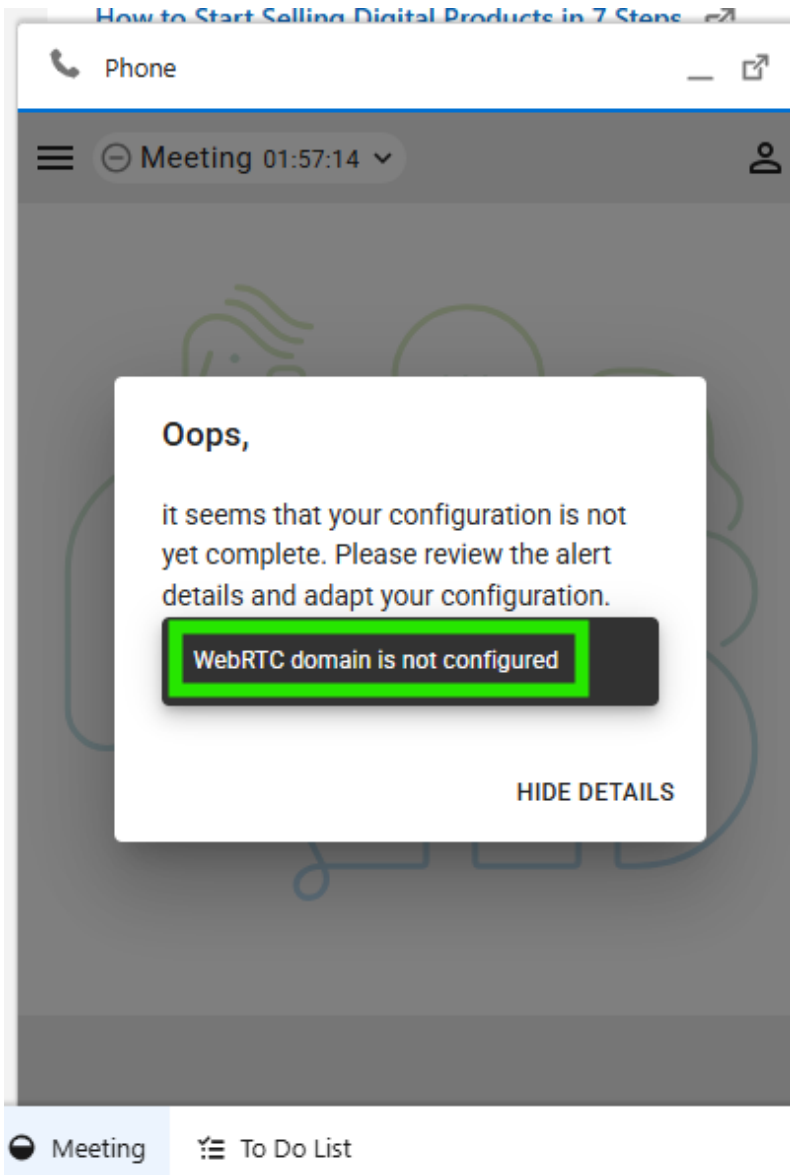


- Navigate to '**Profile Settings > Desktop > Save**' (or type *Call Centers* in the search bar above the left-hand menu).



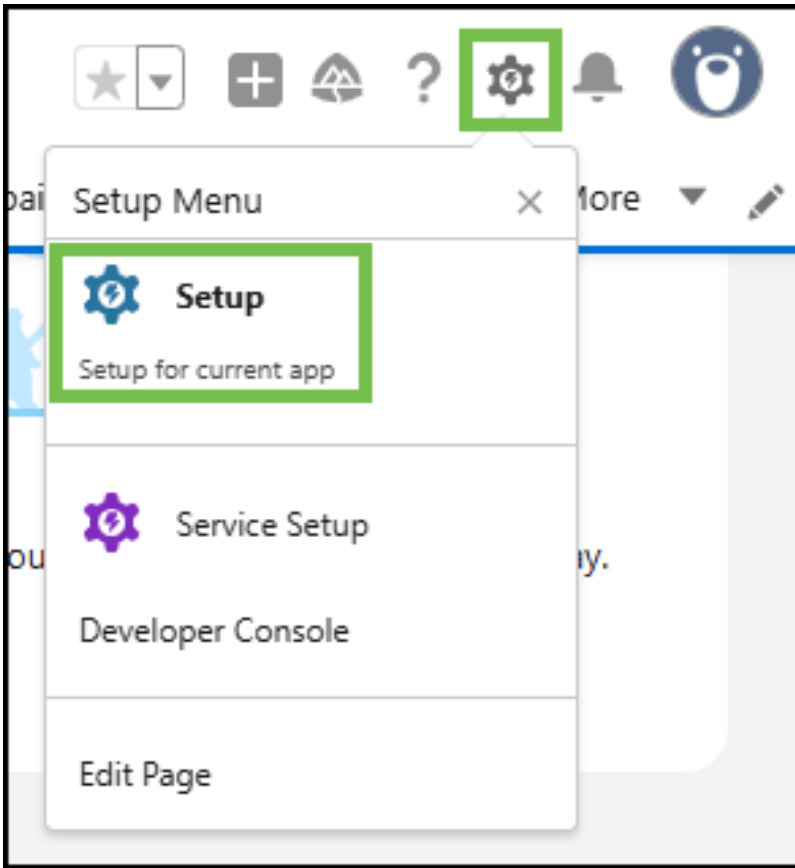
- Once the Save button is hit, the error message pops up "WebRTC domain is not configured"





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`

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 ↑
Edit Del	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
Save Cancel

WxCC Settings

WxCC Region

WxCC WebRTC Domain

General Information

Internal Name

Display Name

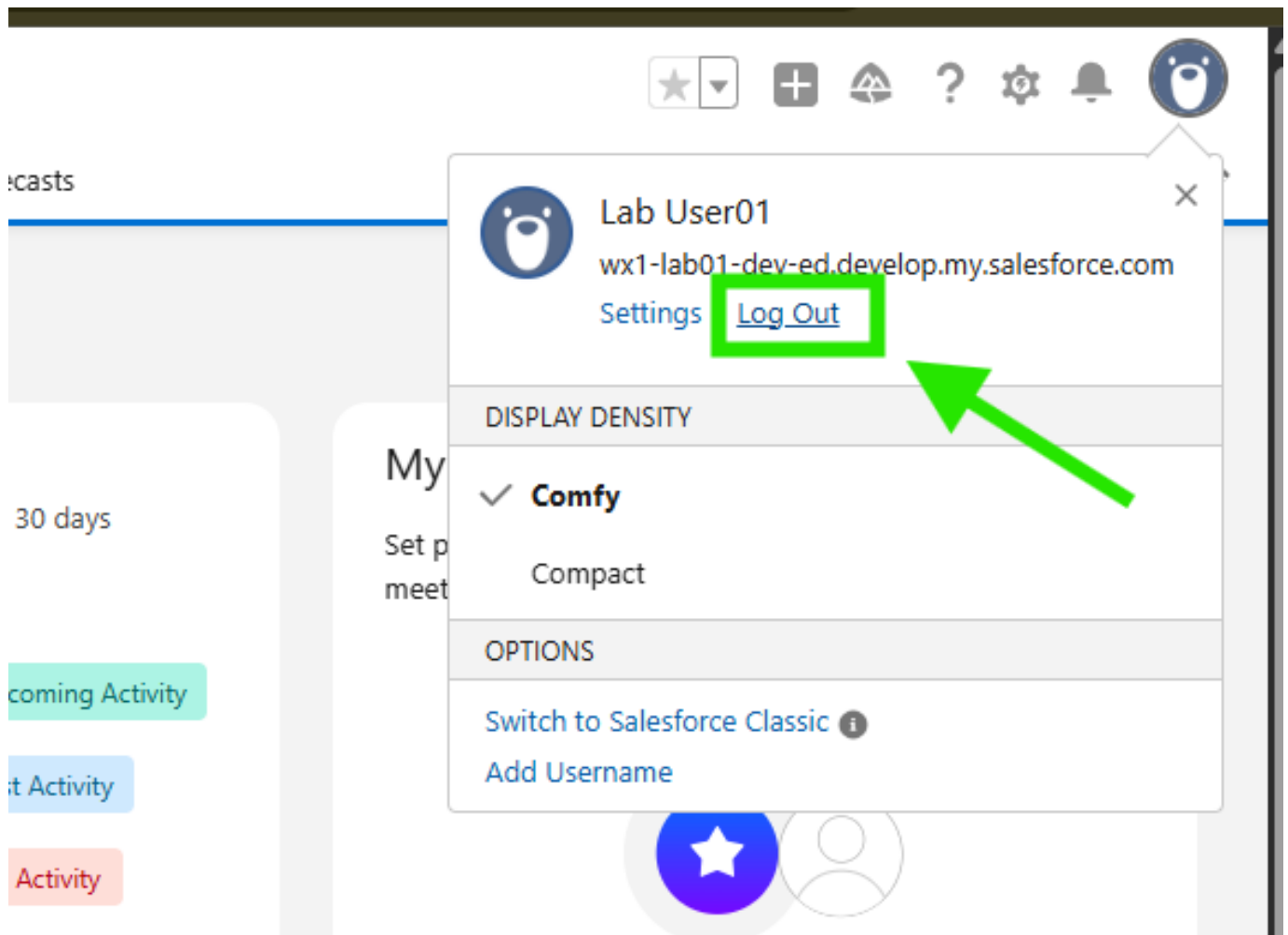
Description

CTI Adapter URL

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.

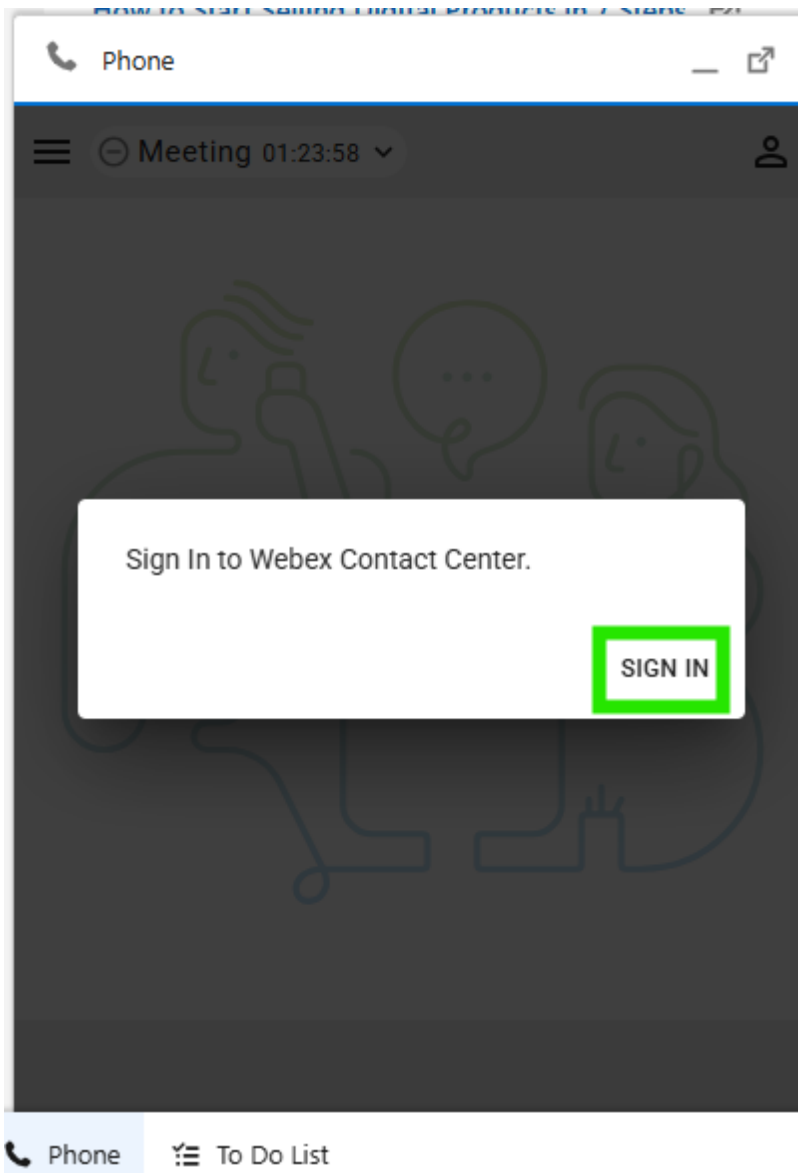


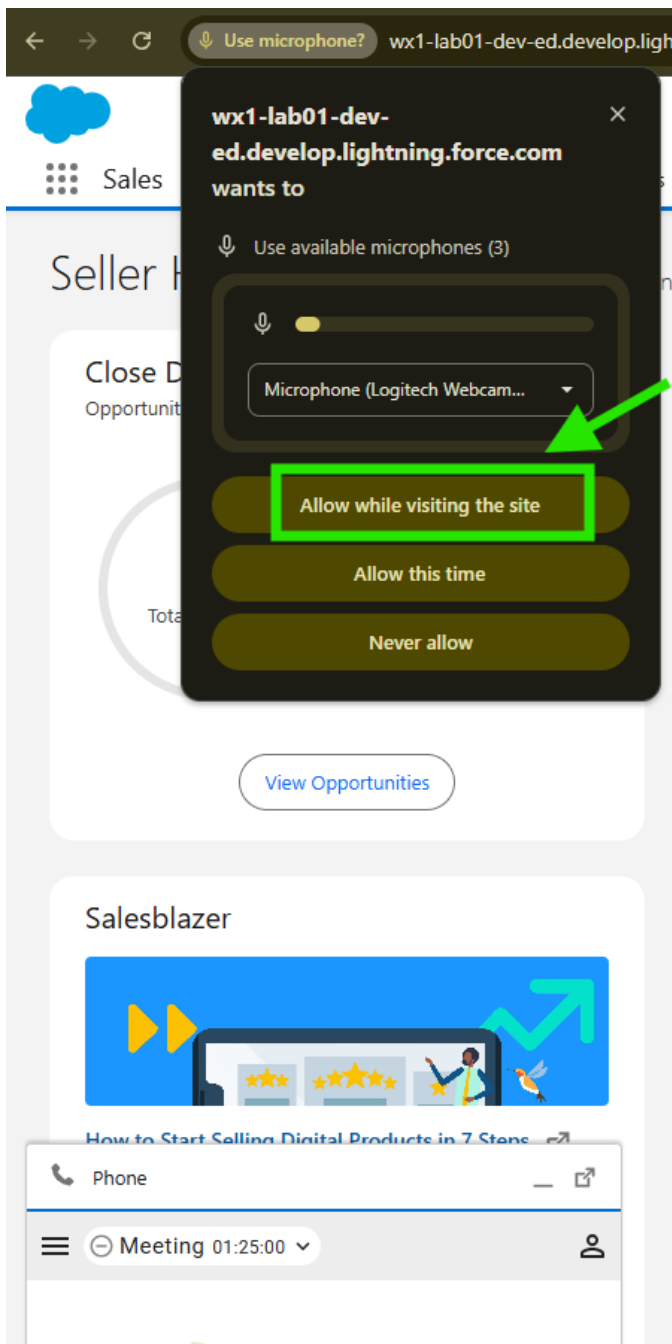
1.4.3 Section 3 - Testing

Attention

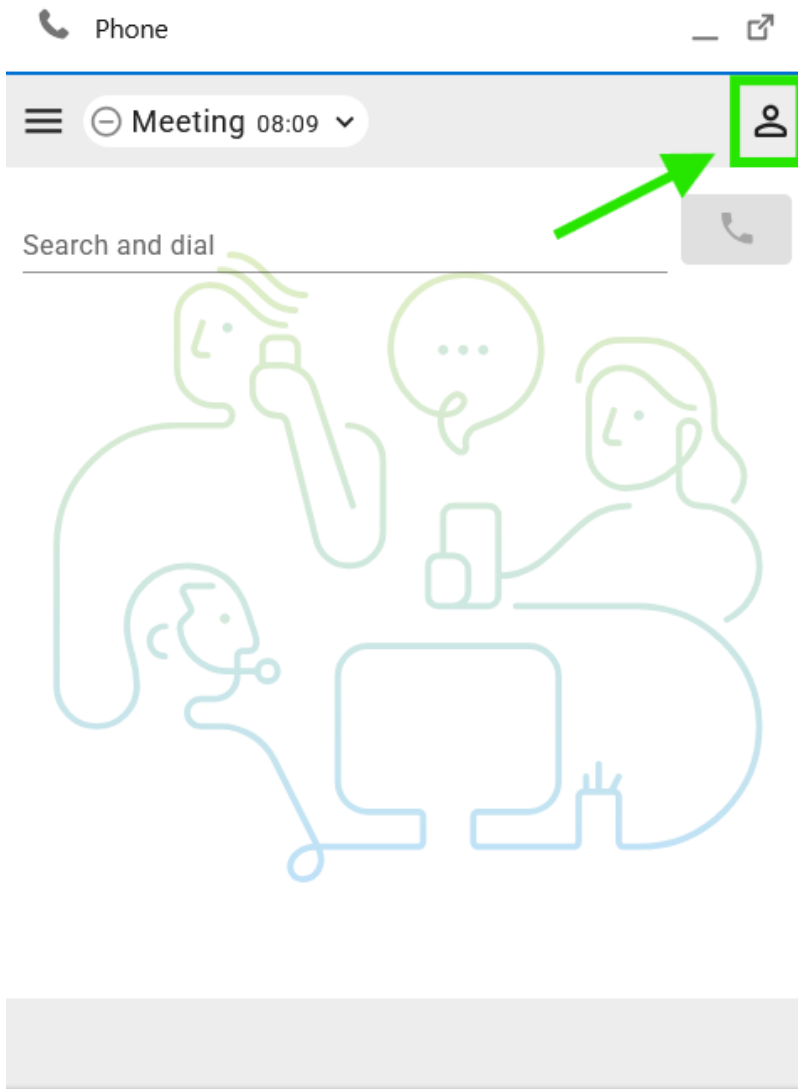
Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

- 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.

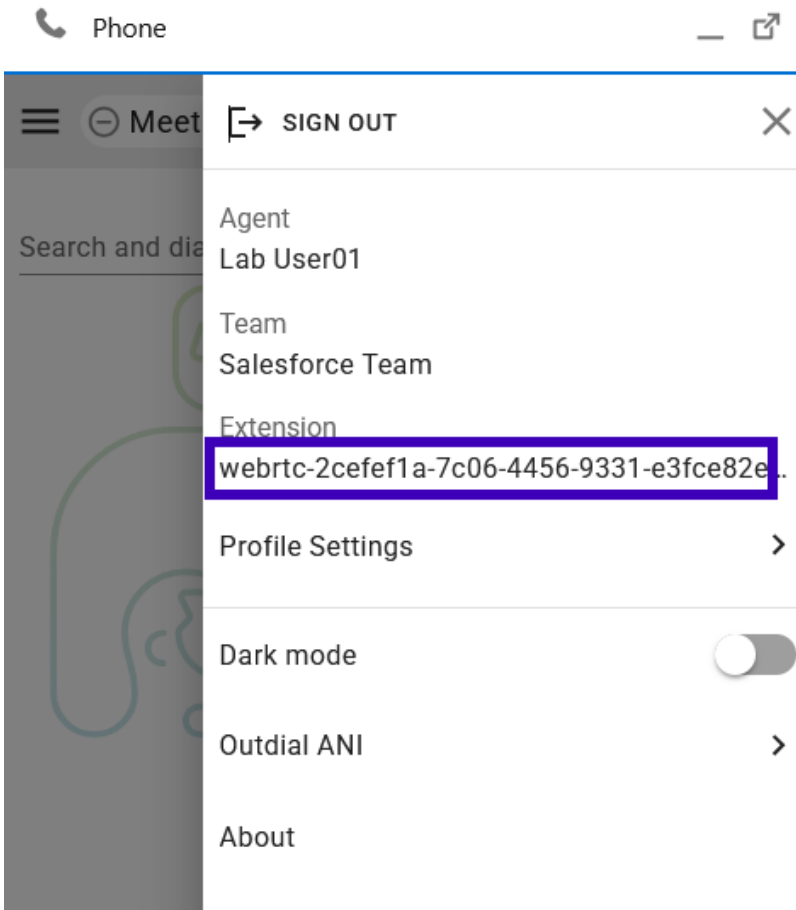




- Navigate to Agent Desktop and select the Avatar on the top right






- 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

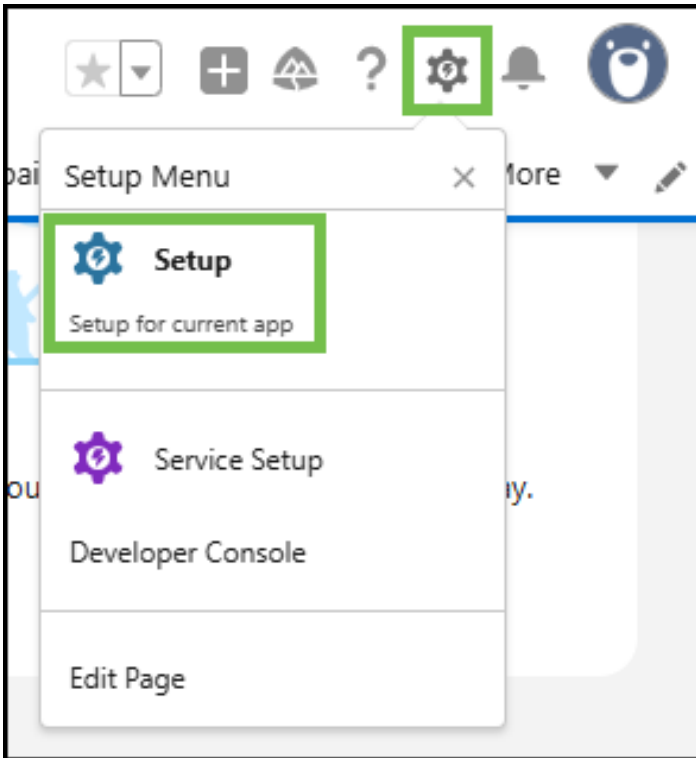
Attention

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

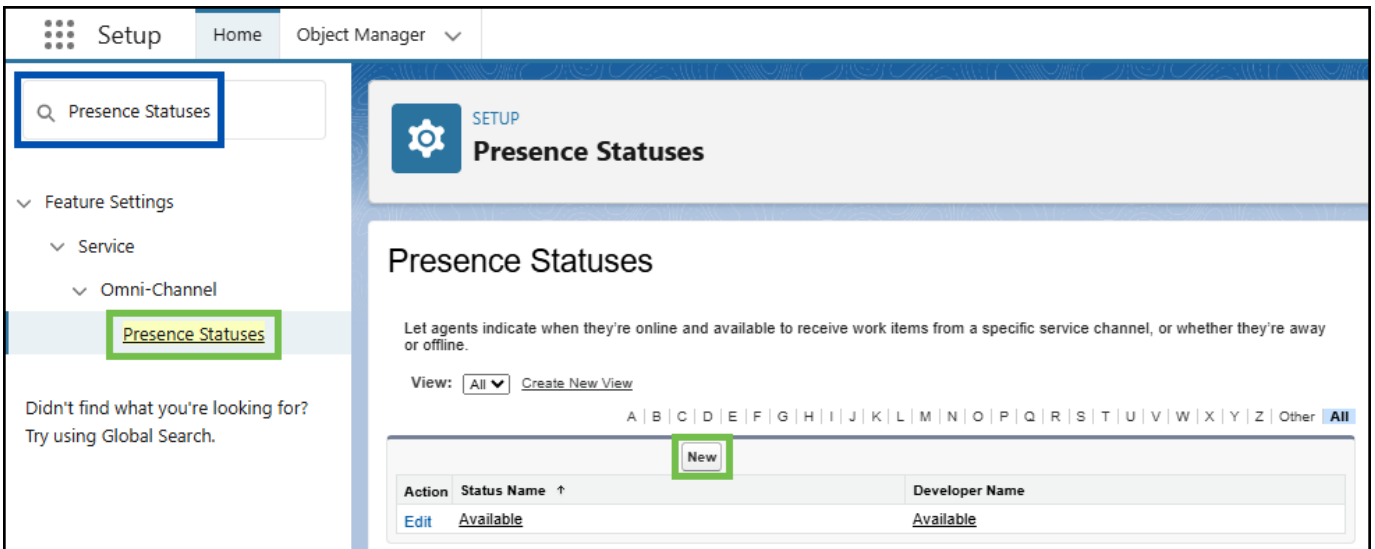
Note

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 **wxcdbusy** 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

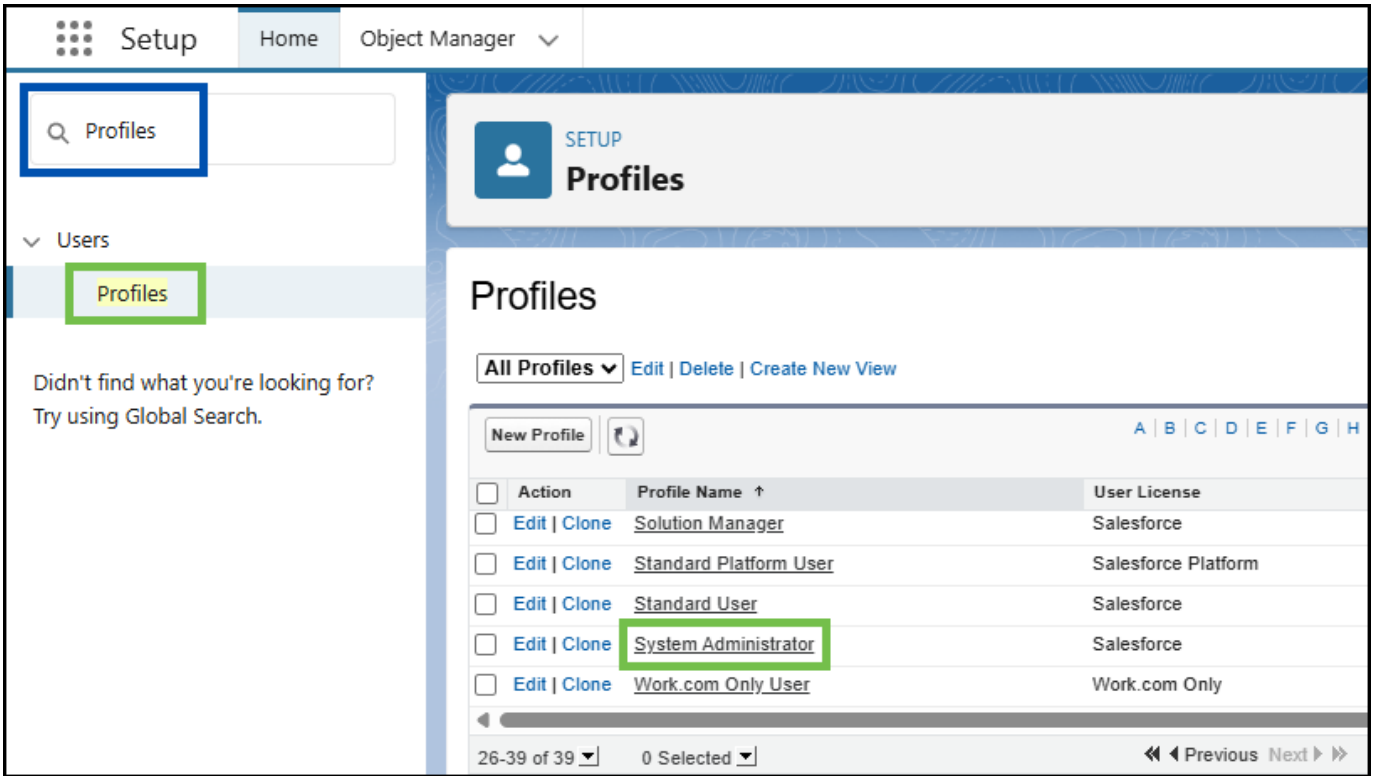
Save Cancel

1.5.2 Section 2 - Enable Presence Statuses for the User Profile

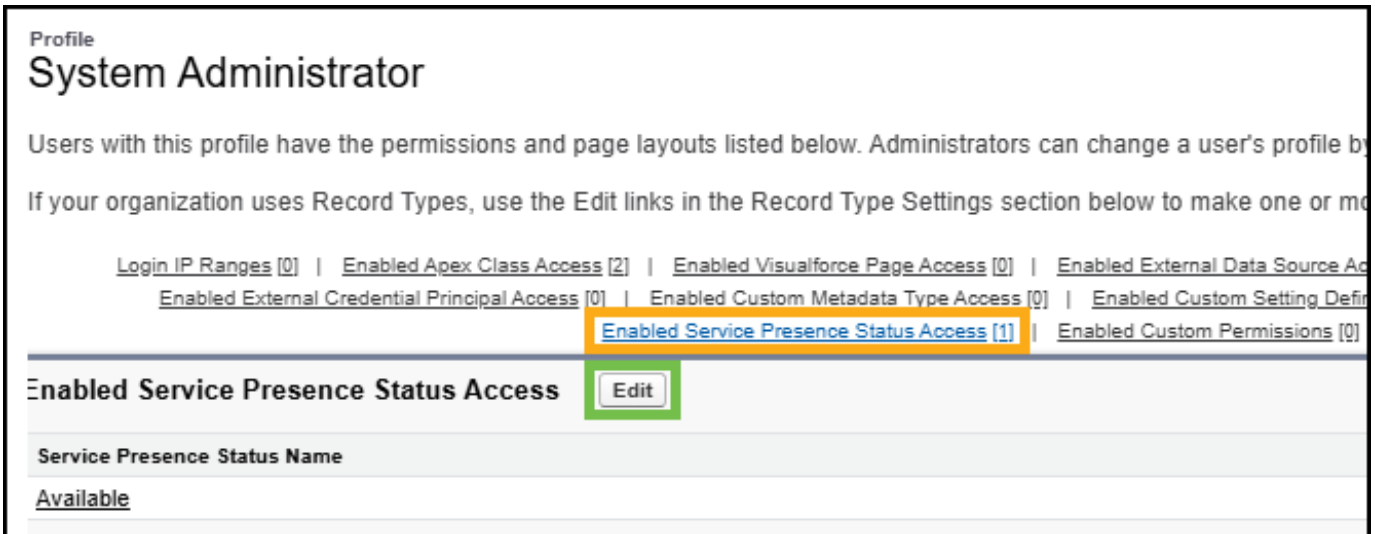
- Navigate to '**Users > Profiles**' (or type *Profiles* in the search bar in the left-hand menu).
- Locate the '**System Administrator**' profile (select **next** at the bottom to go to the next page) and click on it (do not click '**Edit**').

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 **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

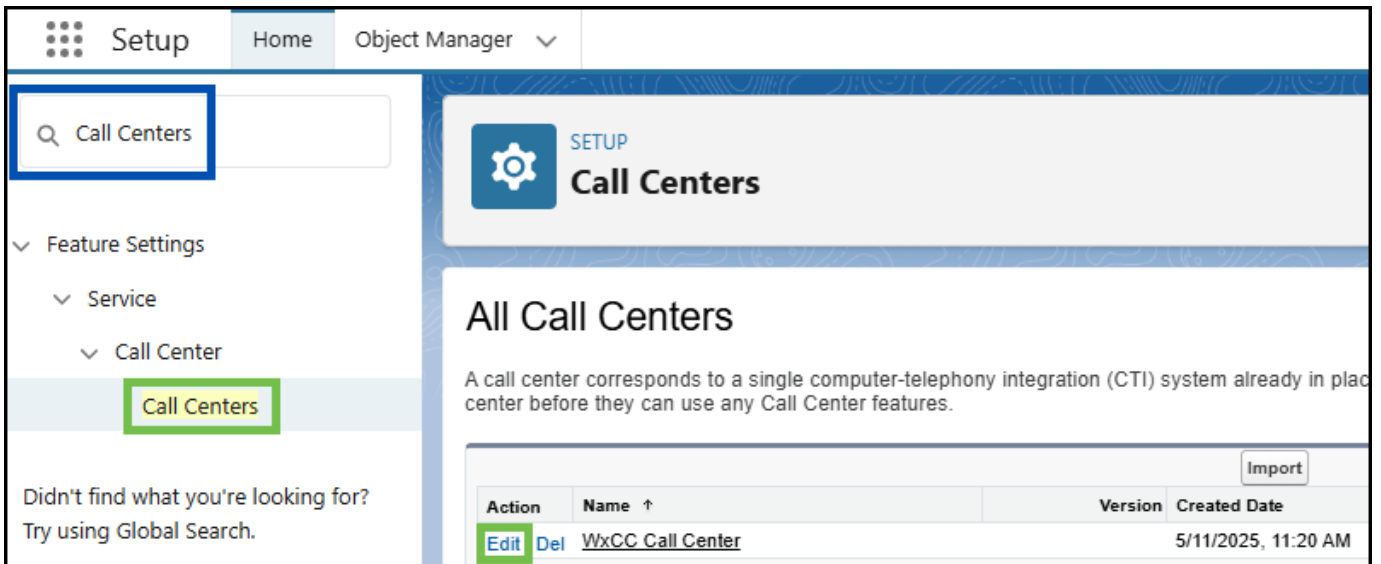
Add ▶

Remove ◀

- Click 'Save'.

1.5.3 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.

SETUP
Call Centers

Omni-Channel State Sync Configuration

Enable Omni-Channel Sync

Omni-Channel Not Ready Reason

WxCC Idle Reason Code

Widget Settings

Send Browser Notifications

Save **Cancel**

- Click 'Save'.

Note

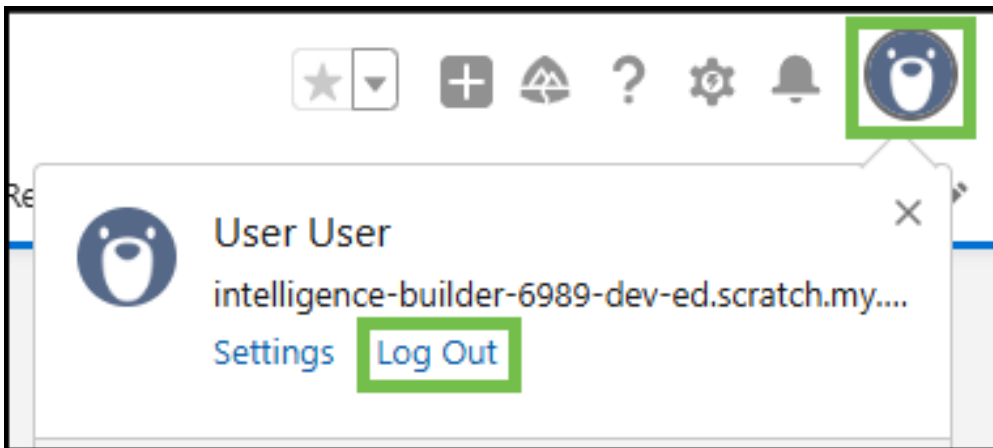
For the purpose of this lab, the idle code **sfbusy** has already been created on the Webex Contact Center side.

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**).



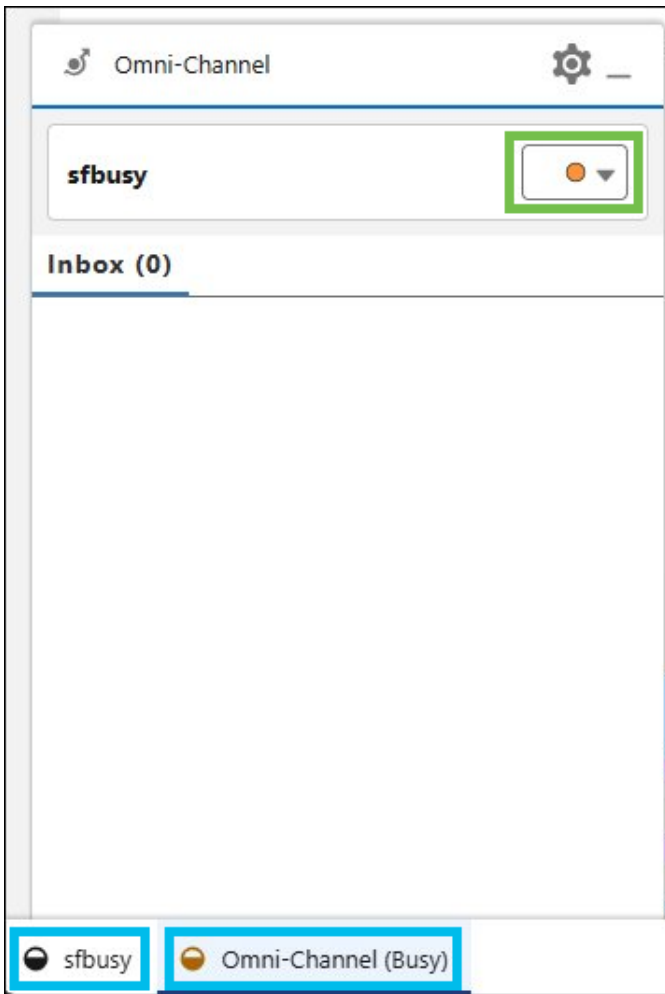
Reminder

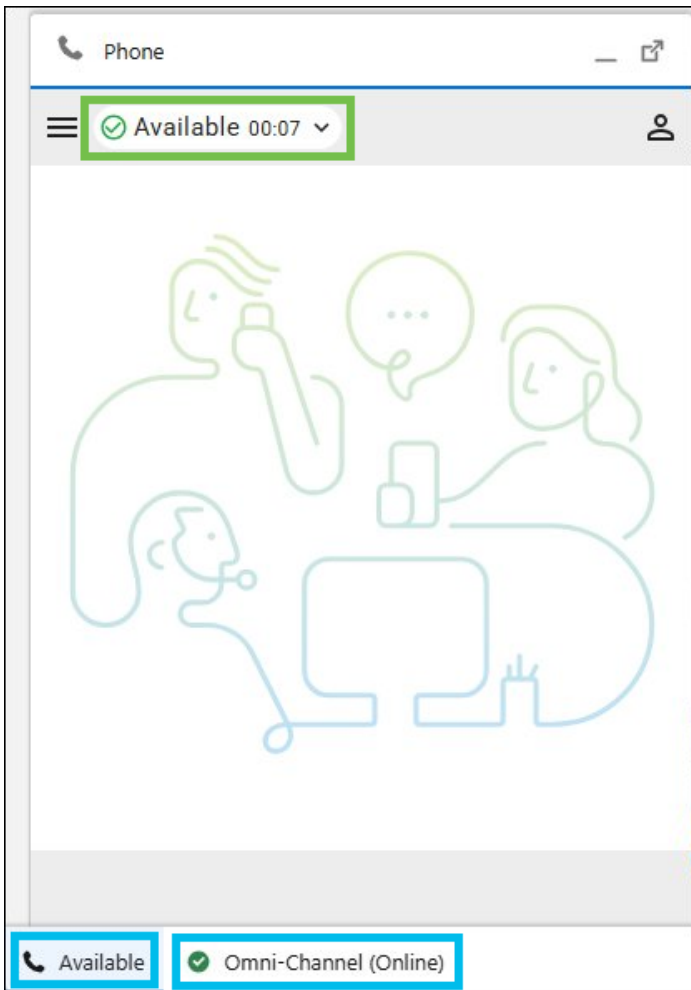
Please select the '**Desktop**' option for the phone number.

- 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 **wxcbusy** 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)

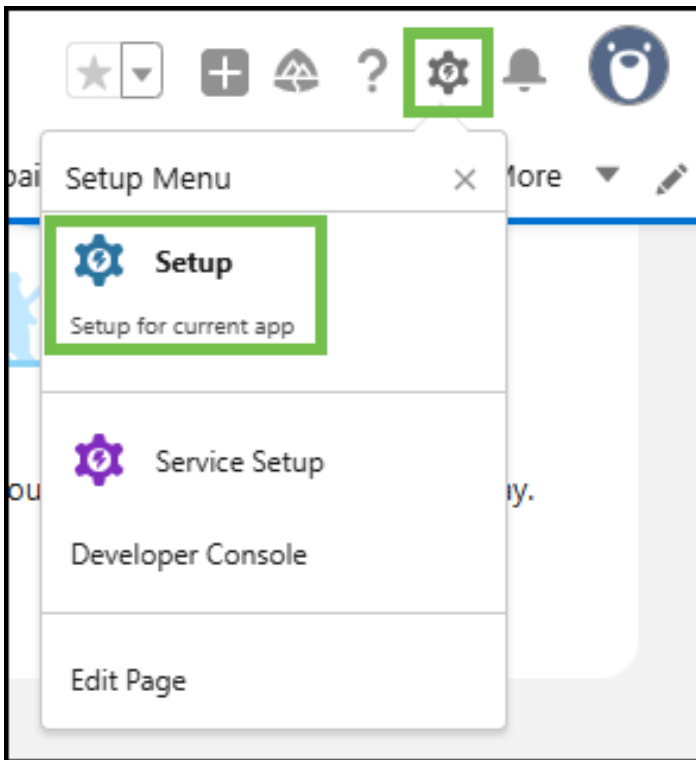




- Congratulations! You have completed the task.

1.5.5 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

Setup Home

Salesforce Go

Service Setup Assistant

Service Cloud Reports

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

Quick Find

SETUP

Presence Statuses

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

View: [Create New View](#)

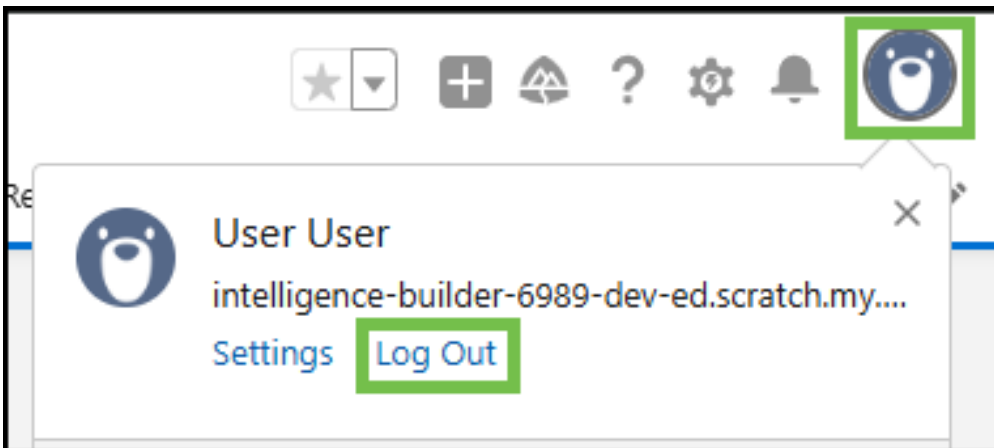
Action	Status Name ↑
Edit	Available
Edit	sfbusy
Edit	wxccbusy

- 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,

- 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 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

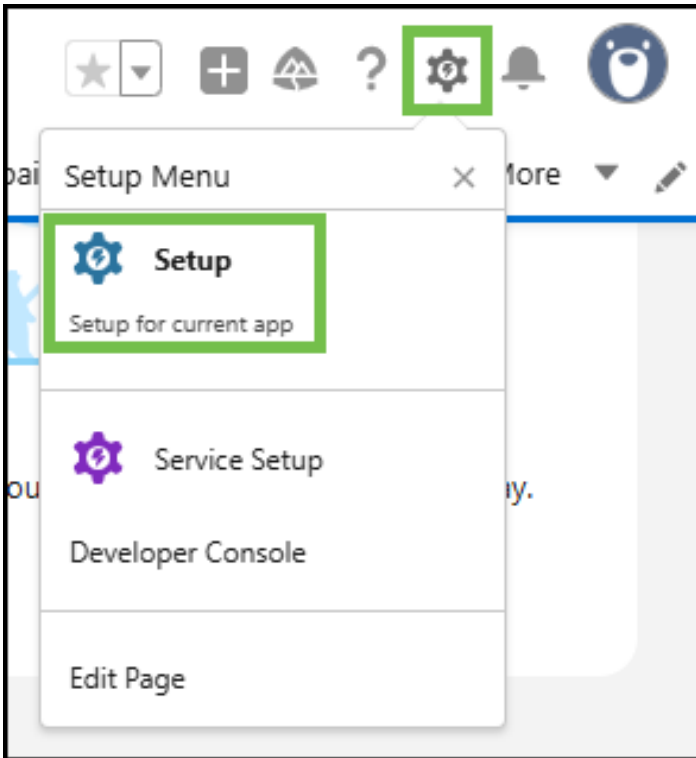
- Configure Call Center in Salesforce for advanced screen pop functionality.
- Customize and publish a Webex Contact Center flow with Salesforce integration.
- Test the integration by triggering a Salesforce contact creation via a phone call.

1.6.1 Section 1 - Salesforce Configuration

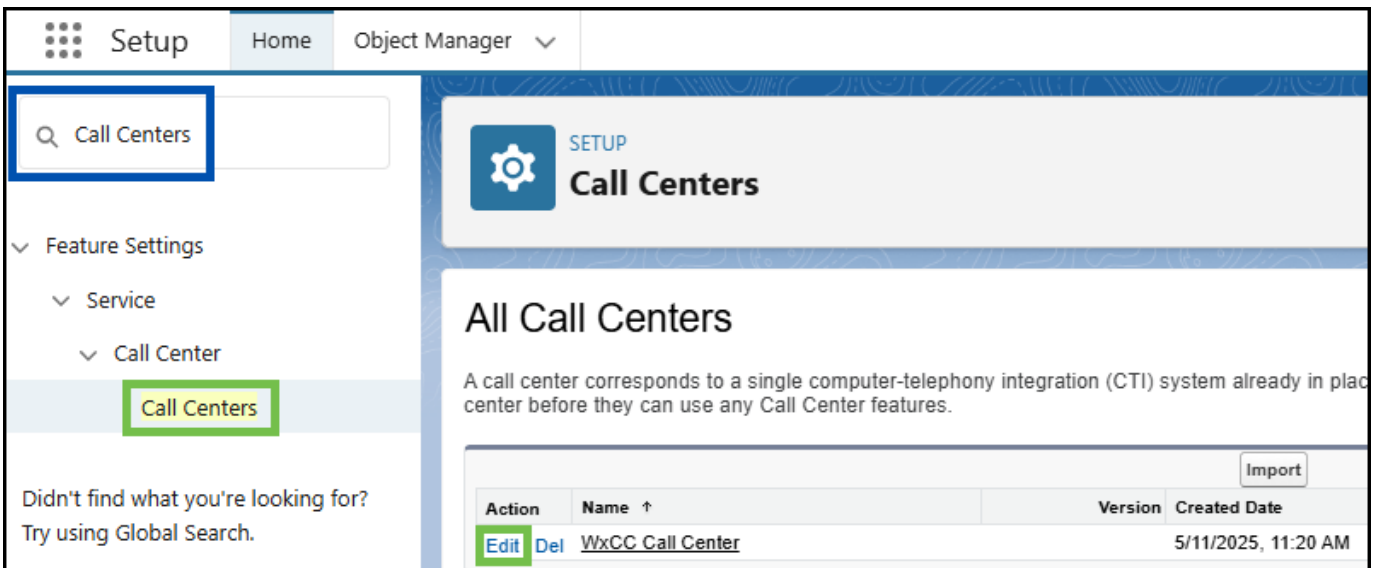
Attention

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:

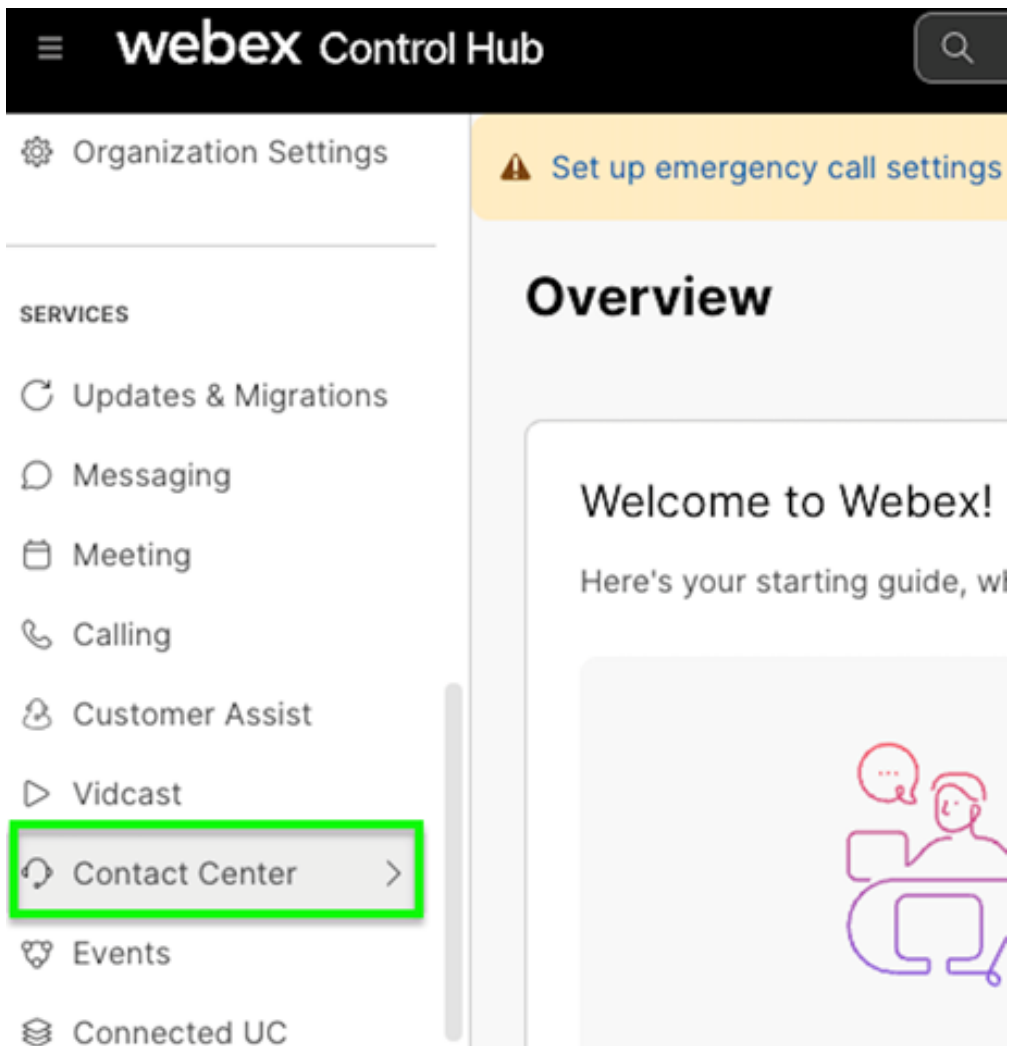
Phone={ani}

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"/>	

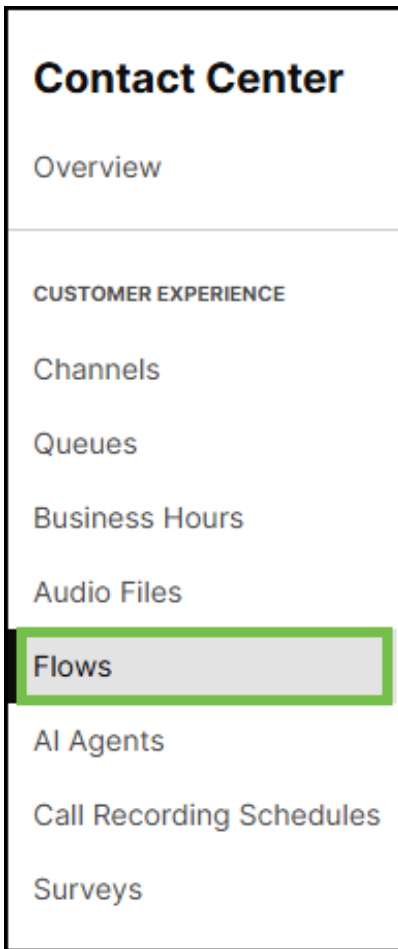
- Click 'Save'.

1.6.2 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.

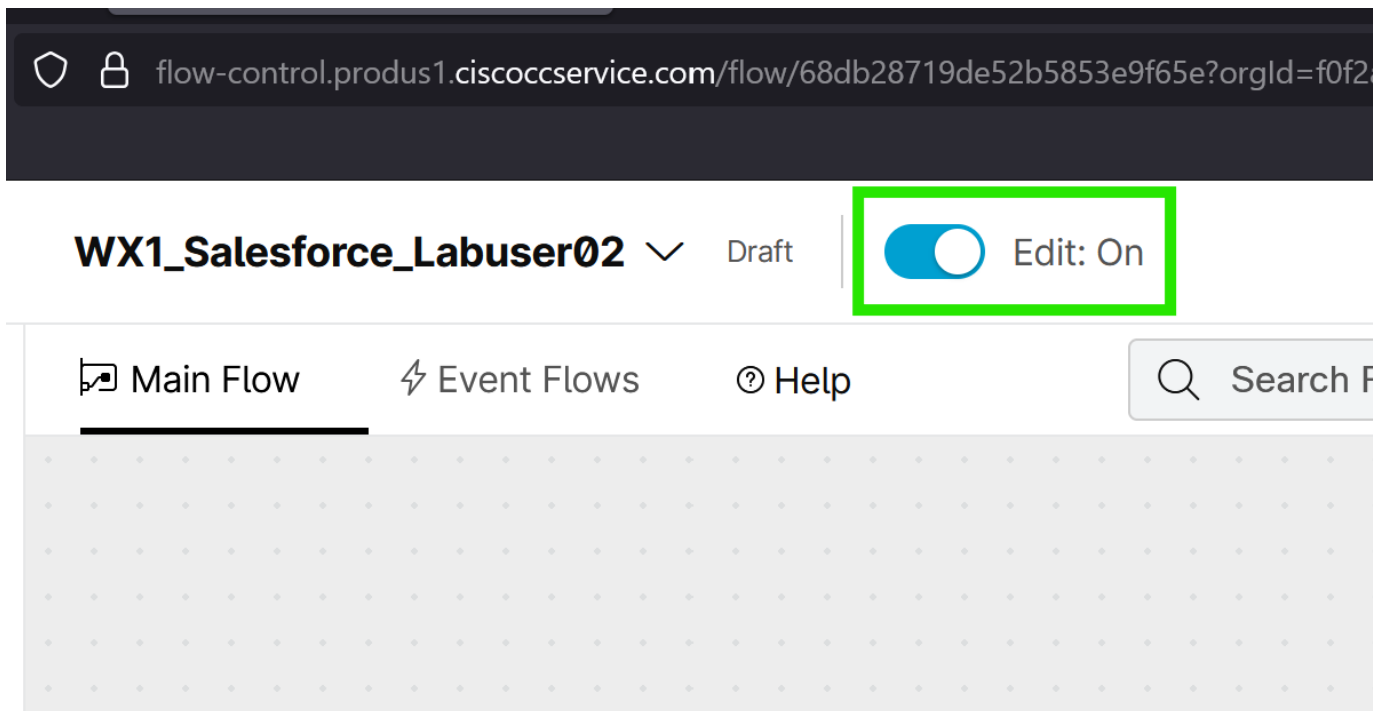
Flows

Flows Subflows Global Variables

Q WX1_Salesforce_LabuserC X All 1 Flows

Flow	Description	Status	Last edited by ↑	Last modified	
WX1_Salesforce_Labuser...		Published	labuser02@wx1.wbx.ai	September 29, 2025 20:52 PM	

- 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**.

The screenshot shows the 'Global Flow Properties' configuration window for 'WX1_Salesforce_Labus...'. The 'Configuration' tab is active, and the 'Desktop Viewability & Order' section is visible. A modal window for the variable 'sfurl' is open, displaying the following details:

- Variable Type:** String
- Default Value:** wx1-labNN-dev-ed.develop.lightning.force.com
- Contains Sensitive Information:** No

A green circle highlights the edit icon in the modal, with a green arrow pointing to it. Another green arrow points from the modal to the 'sfurl' variable card in the variable list below. The list also contains a 'taskchoice' variable. An 'Add Flow Variable' button is located at the bottom of the list.

✕

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 ⓘ

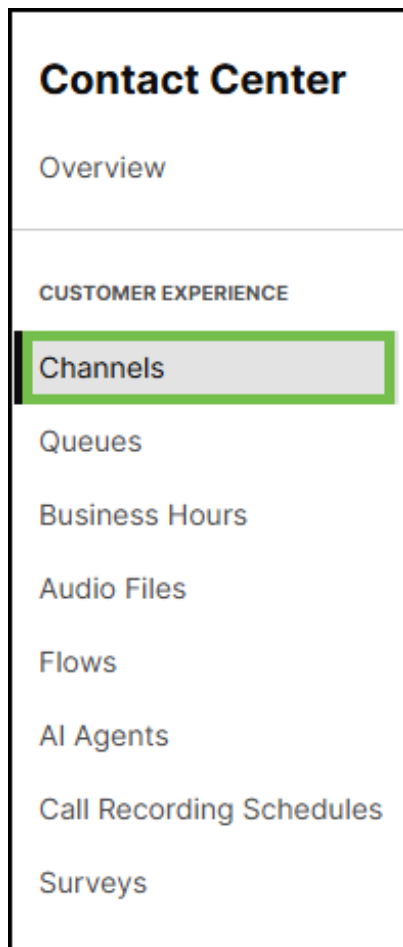
Make Agent Viewable ⓘ

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.



- Open **WebexOne_AI_EntryPoint_ID** (where '**ID**' is your lab user number, e.g., *labuser07@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.

Timezone (Business hours only) * ▼
 America/New_York


Routing flow ^
WX1_Salesforce_Labuser01 ▼

Music on hold * ▼
 defaultmusic_on_hold.wav

Version label * ▼
Latest

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

Override flow settings



No overrides available

The flow is outside your access range, so the overrides aren't visible to you.

This is the phone number customers will call to reach your business. You can select multiple from the numbers you have configured under Webex Calling services as needed. These numbers are already configured in your Webex Calling service. For more information, go to [numbers page](#).

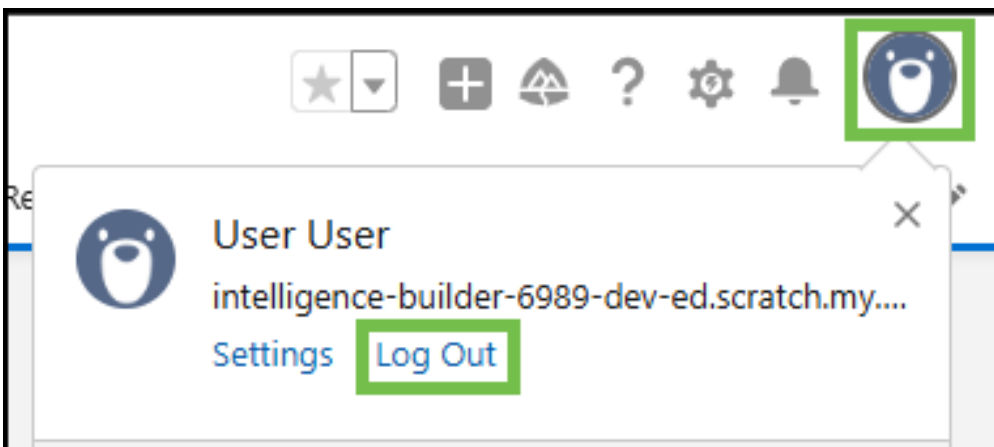
Number	Webex Calling location	Support number	PSTN Region	Actions
1	RTP Location 8	+19842906068	Default	✎ 🗑

1.6.3 Section 3 - Testing

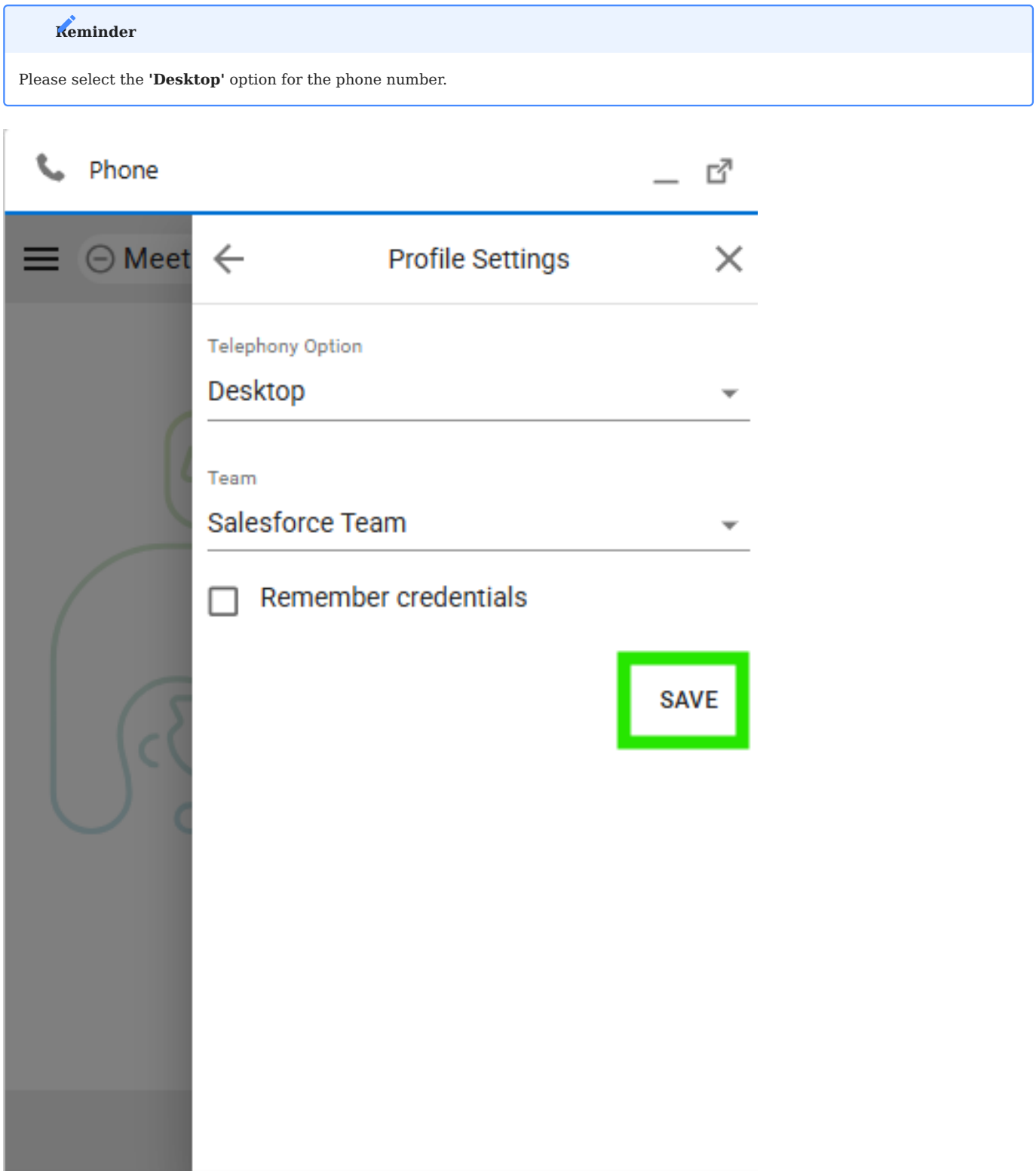
Attention

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**.




- 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--

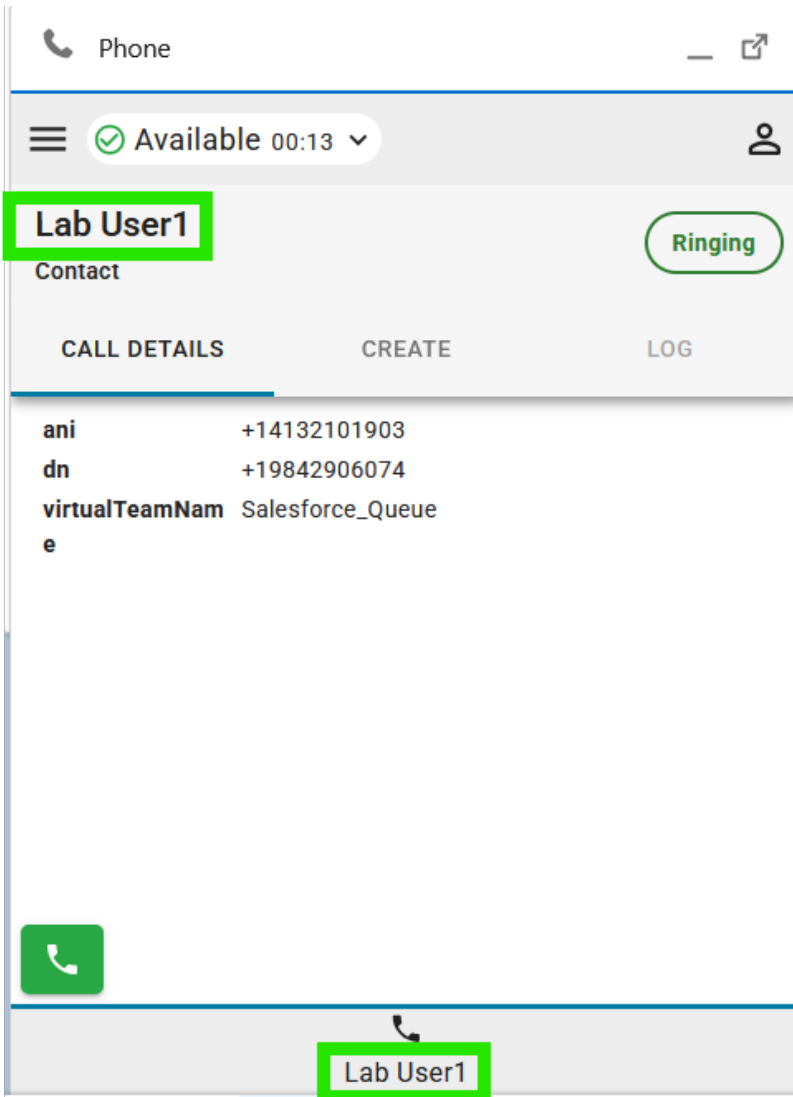
Cancel

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 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

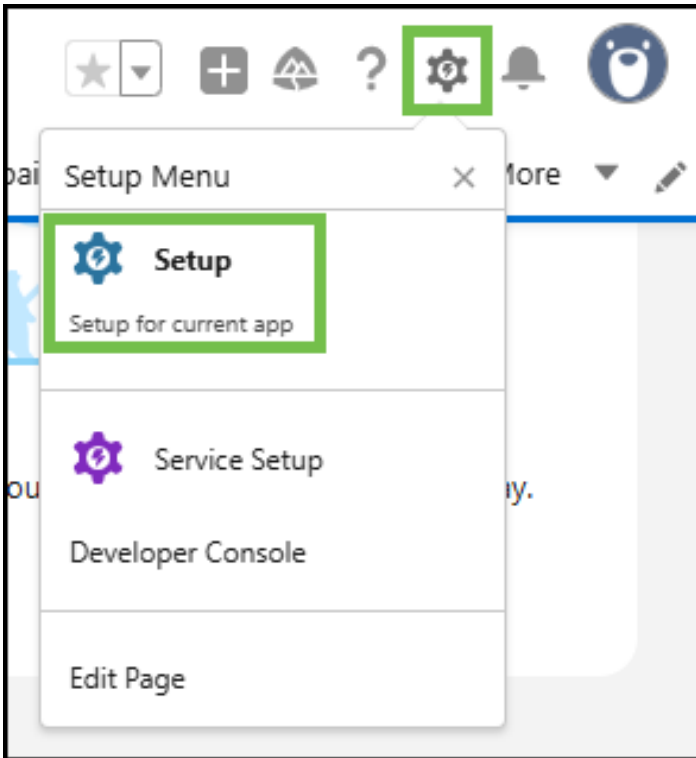
- Update Salesforce Call Center settings to enable advanced screen pop with the case variable.
- Test case creation and retrieval in Salesforce via the Webex Contact Center phone widget.
- Have the case list open in a new tab during case retrieval.

1.7.1 Section 1 - Modifying Call Center Options in Salesforce

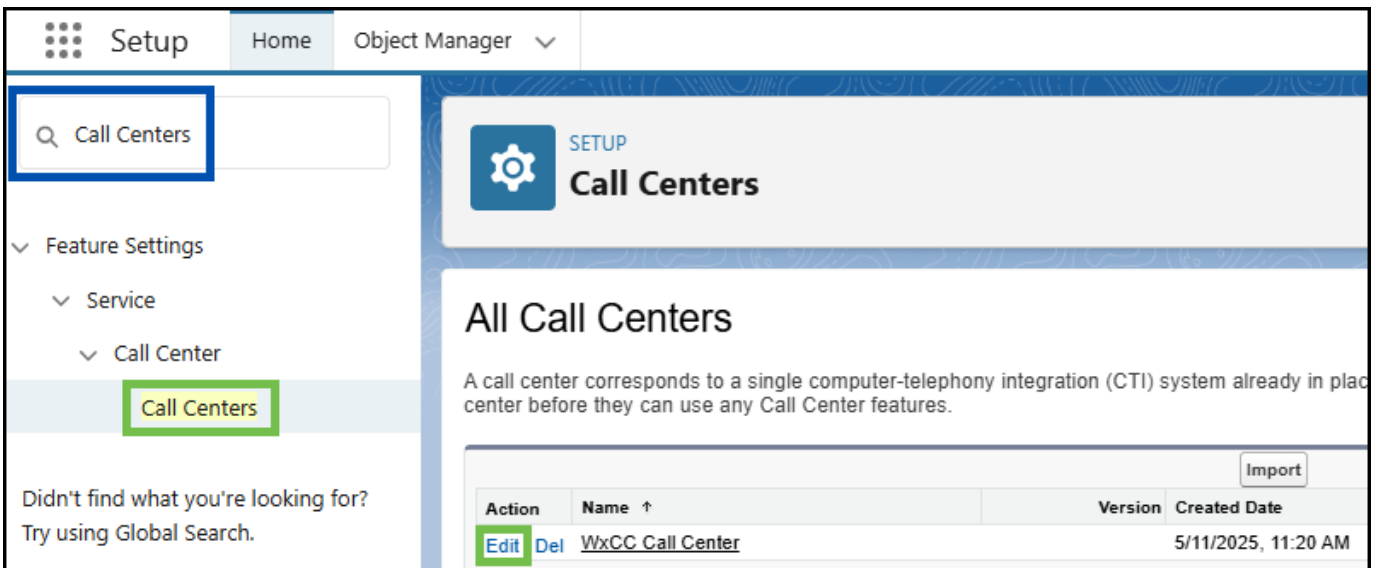
Attention

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

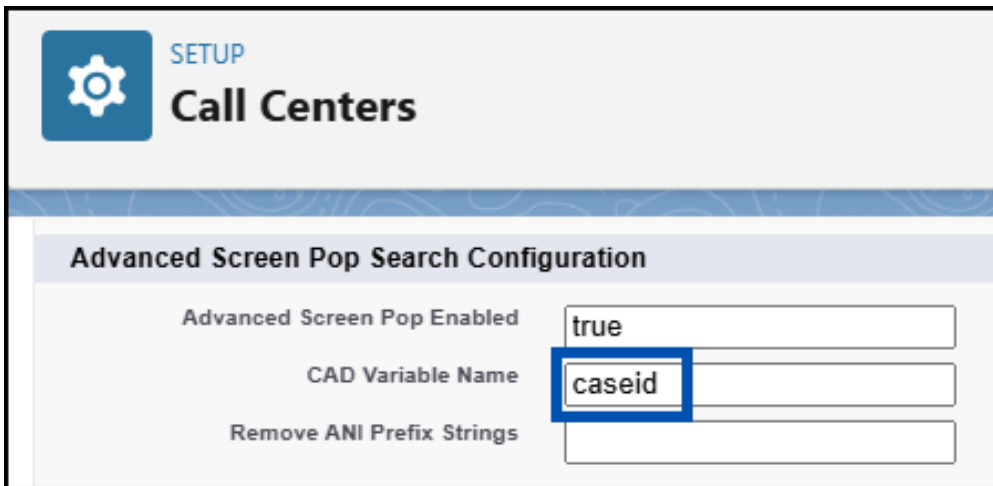
- Navigate to '**Setup**' by clicking the gear icon in the top-right corner and selecting '**Setup**'.



- 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**'



SETUP
Call Centers

Advanced Screen Pop Search Configuration

Advanced Screen Pop Enabled

CAD Variable Name

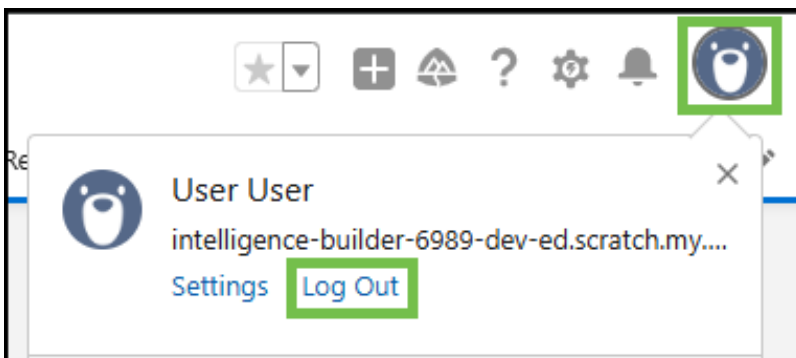
Remove ANI Prefix Strings

1.7.2 Section 2 - Testing

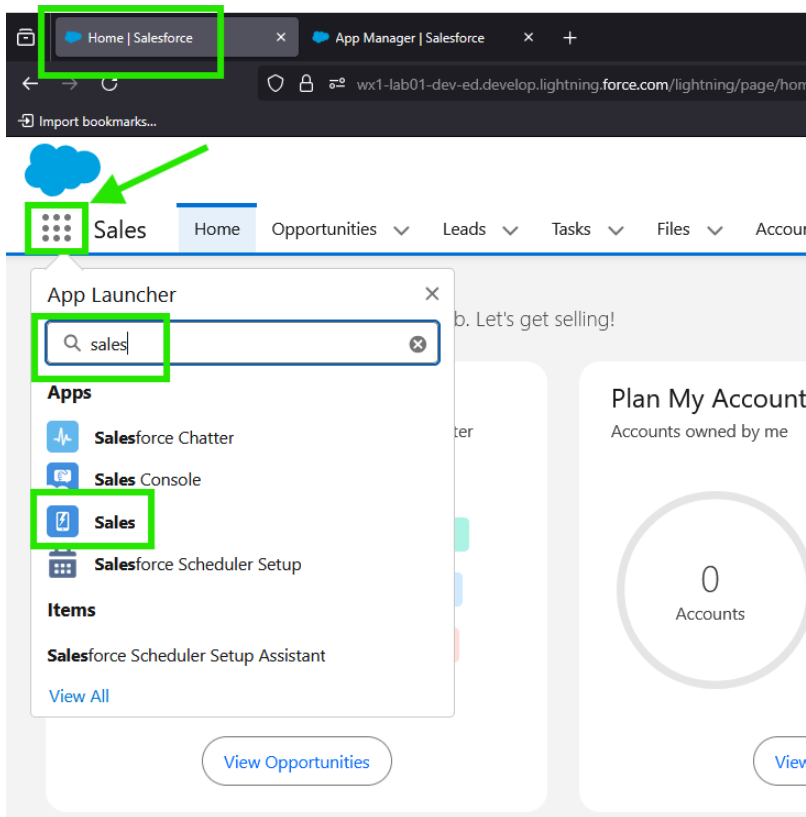
Attention

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.



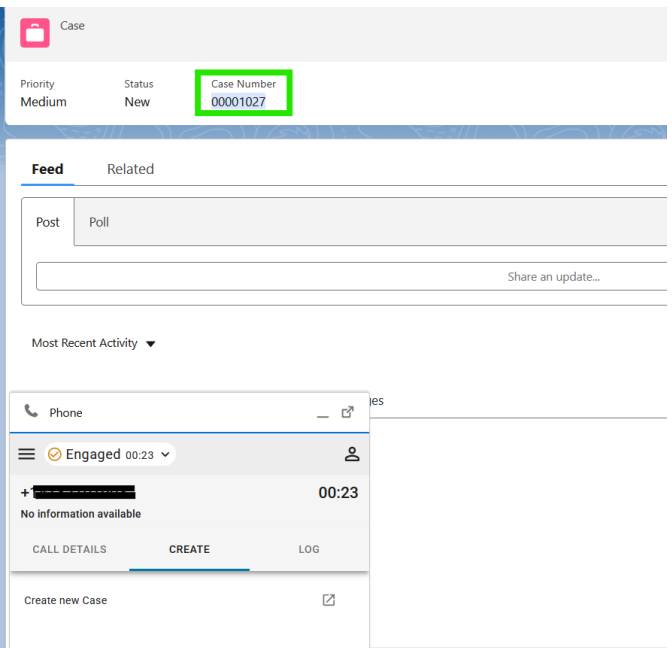
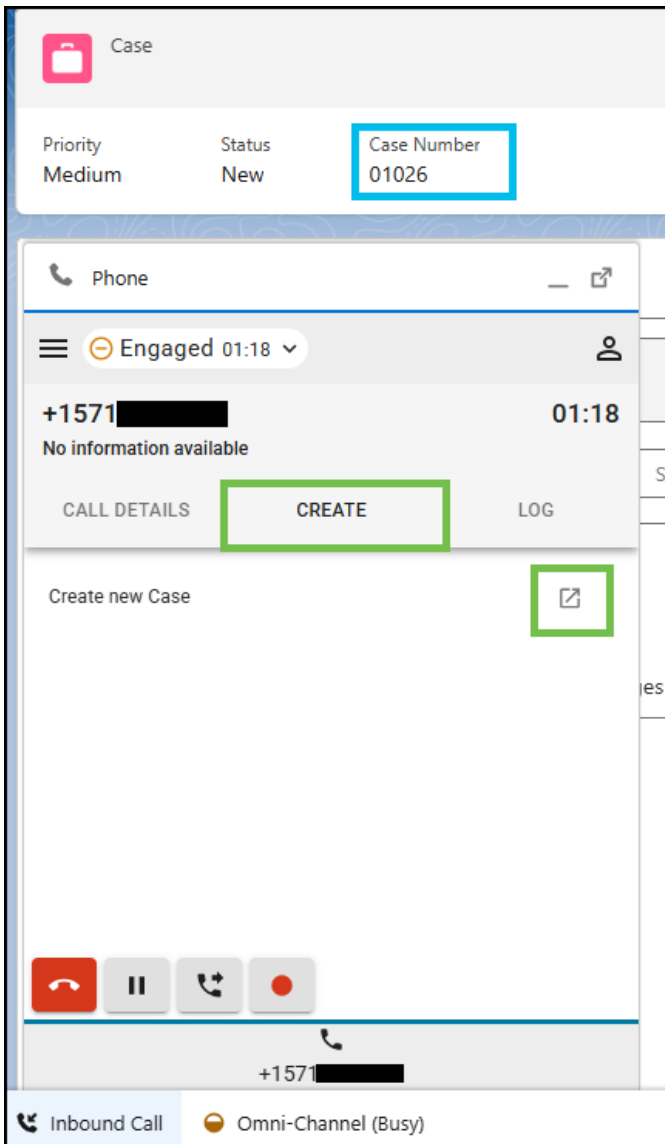
- Open the Webex Contact Center phone widget and login using the selected Webex Contact Center credentials.
- For the team use **Salesforce_Team**.

Reminder

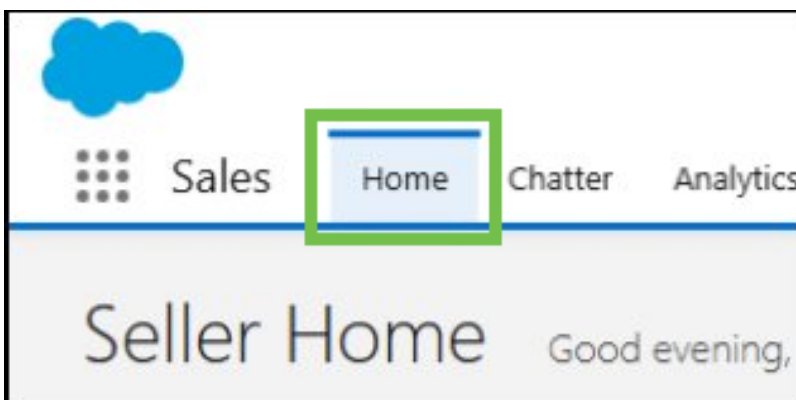
Please select the '**Desktop**' option for the phone number.

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 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.

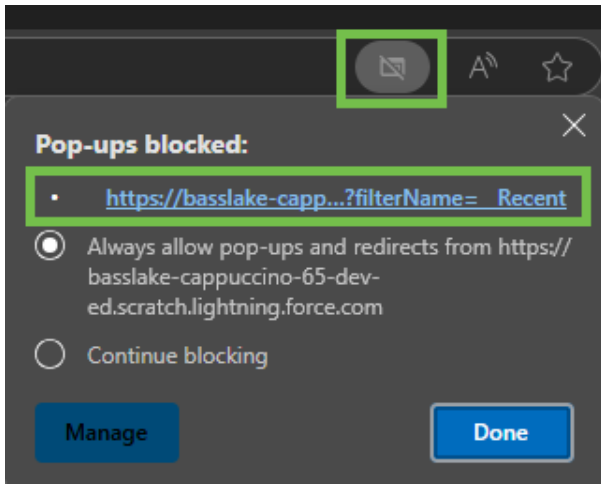


Second call interaction:

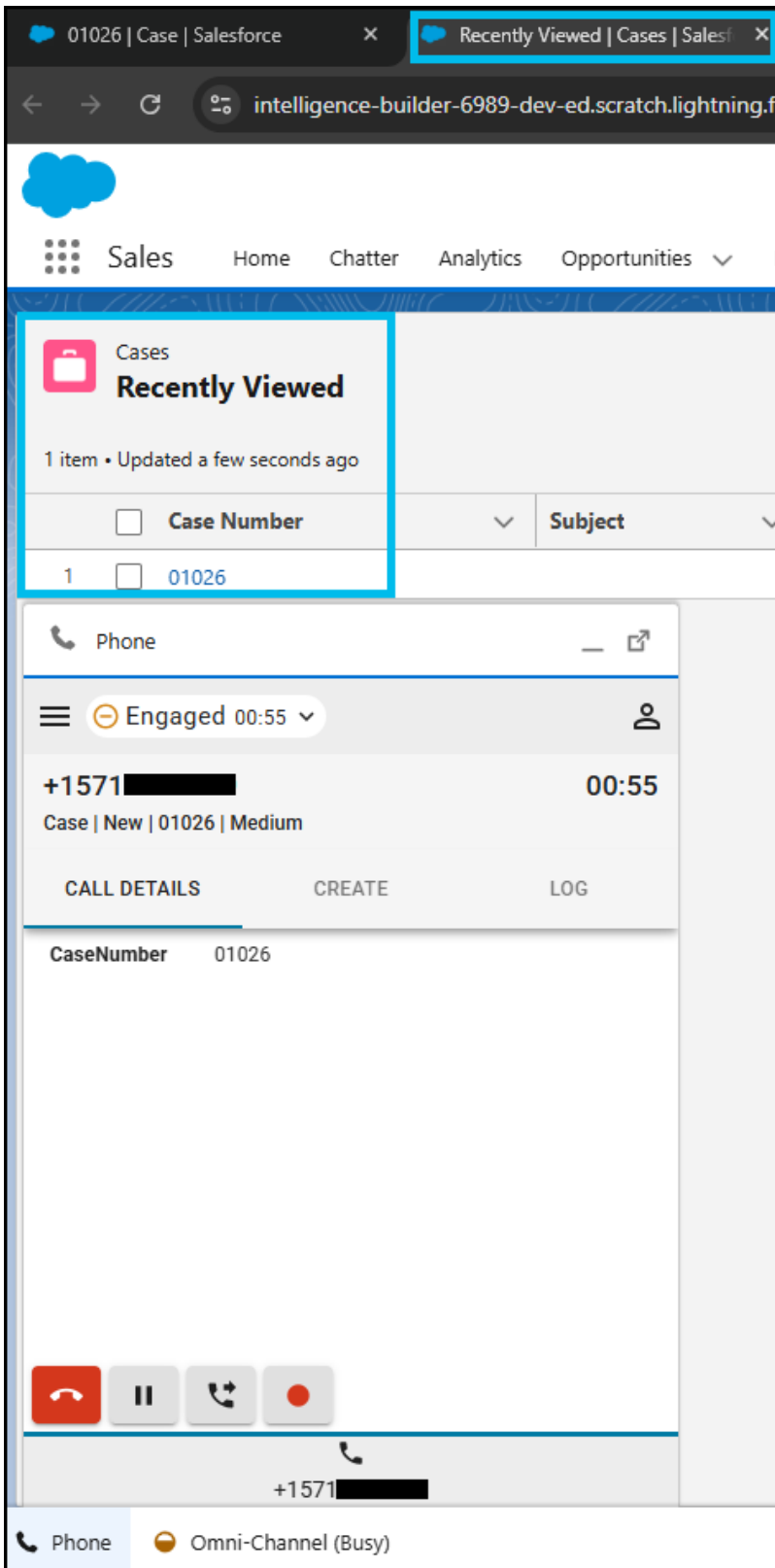
- Make sure that agent state is set to 'Available' and then call the channel number again. In the IVR, choose **Option 5**.
- Provide the case number that was created during the previous call.
- The existing case should be displayed, and the case list should be displayed in a new tab.
- Select the **Phone** 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 | Salesf...". 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" header is visible with a red icon. A table-like structure shows case details: "Priority: Medium", "Status: New", and "Case Number: 01026". A call log overlay is positioned in the foreground, showing a "Phone" icon, a status of "Engaged 00:21", and a phone number "+1571 [REDACTED]". Below the call log, there are buttons for "CALL DETAILS", "CREATE", and "LOG". A table entry shows "CaseNumber: 01026". At the bottom of the call log, there are icons for "End Call", "Pause", "Transfer", and "Hold". The bottom status bar indicates "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 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

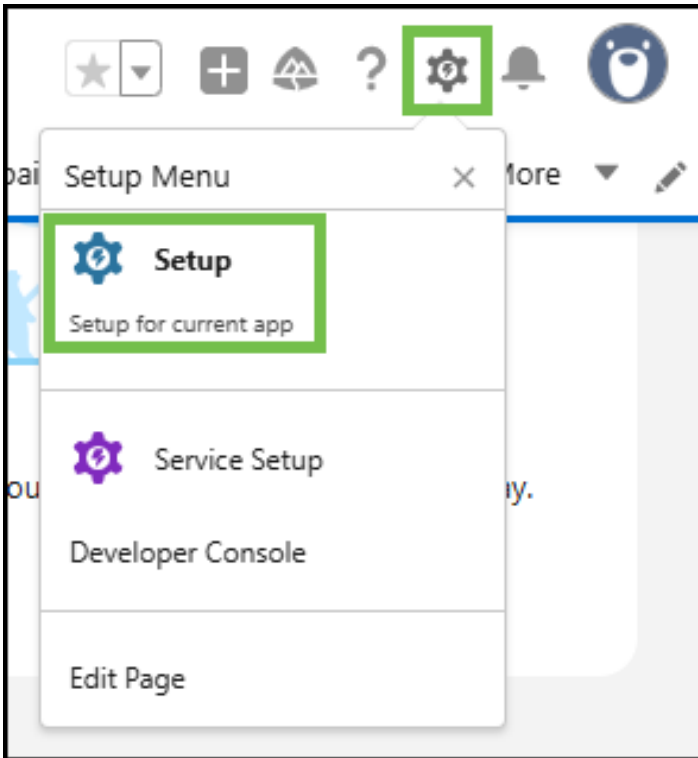
- Enable auto case creation via the Salesforce Call Center configuration file.
- Set up CAD variable field mapping for auto case creation in the Salesforce Call Center settings.
- Test the auto case creation and CAD variable field mapping.

1.8.1 Section 1 - Modifying Call Center Options in Salesforce

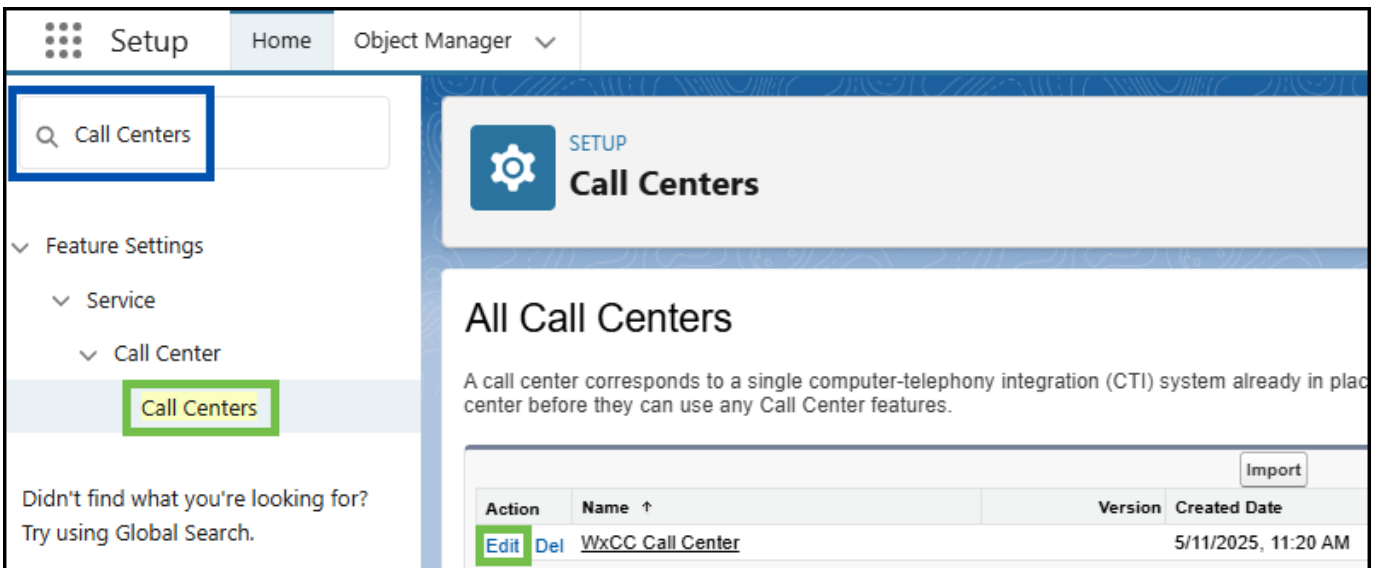
Attention

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	<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"/>
----------------------------	------------------------------------