LAB-2308

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

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1. Lab

1.1 Overview

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 **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.

1.1.2 Disclaimer

This instructional guide is designed to familiarize participants with some of the capabilities of the **New Webex Contact Center CRM Connector** for **Salesforce**. While the lab design and configuration examples can serve as a reference, they are not representative of a real-world design; therefore, not all recommended features are utilized or optimally enabled. For design-related questions, please contact your Cisco representative or a Cisco partner.

1.1.3 Lab Topology

This lab utilizes the Webex Contact Center cloud environment.

1.2 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/			
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 selecte	ed pod is 2)	
WxCC Password	webexONE1!			
Salesforce	labuser ID @wx1.wbx.ai		(where ID is your selected pod number	
Username	(01 through 30); i.e. labuser 02 @wx1.wbx.ai if selected pod is 2)			
Salesforce	webexONE1!	Î		
Password				

Ask 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 Section 1 - Configure Call Center



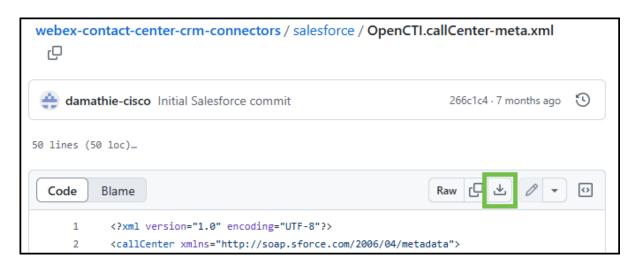
Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

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

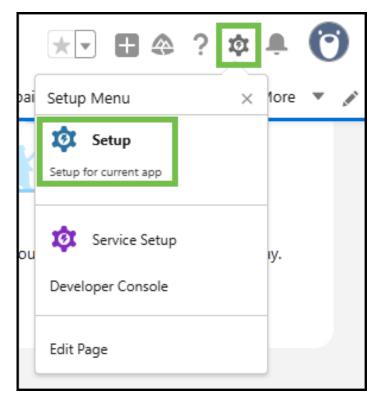


The package for the WxCC V2 Salesforce connector is already pre-installed. In production environments, it will need to be installed manually and can be retrieved from this link.

• 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').



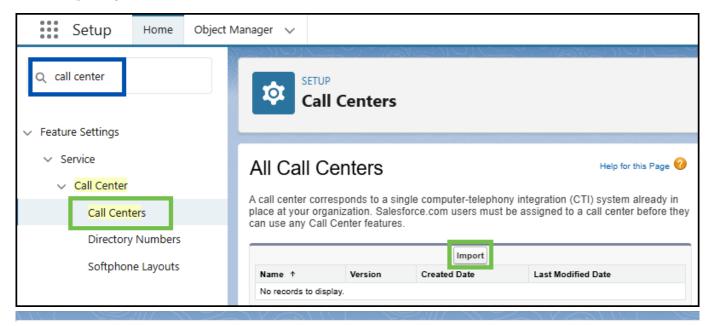
• In Salesforce, navigate to 'Setup' by clicking the gear icon in the top-right corner and selecting 'Setup'.



- 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.

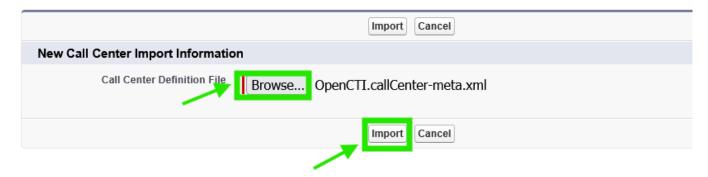


- Click 'Import', select 'Browse' and choose the call center definition file (downloaded earlier).
- Click 'Import' again to save the added file.



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



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



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

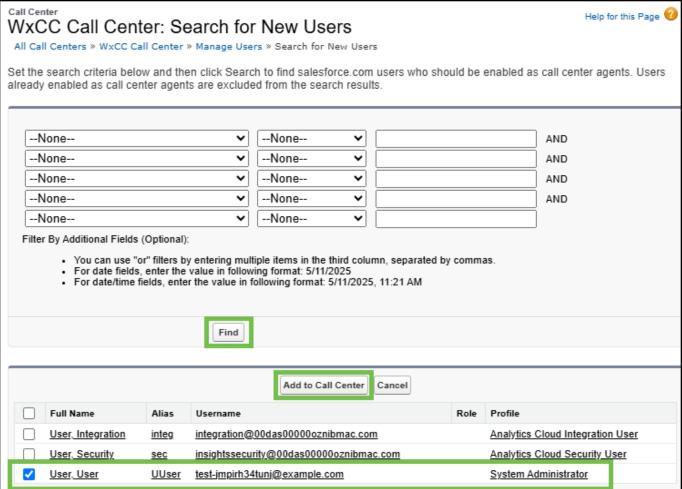
WxCC Call Center

All Call Centers » WxCC Call Center



- 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'.



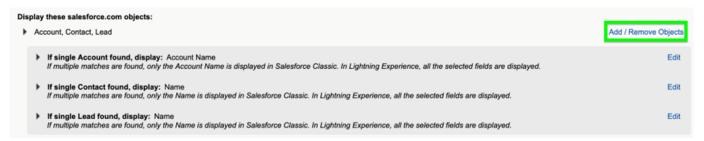


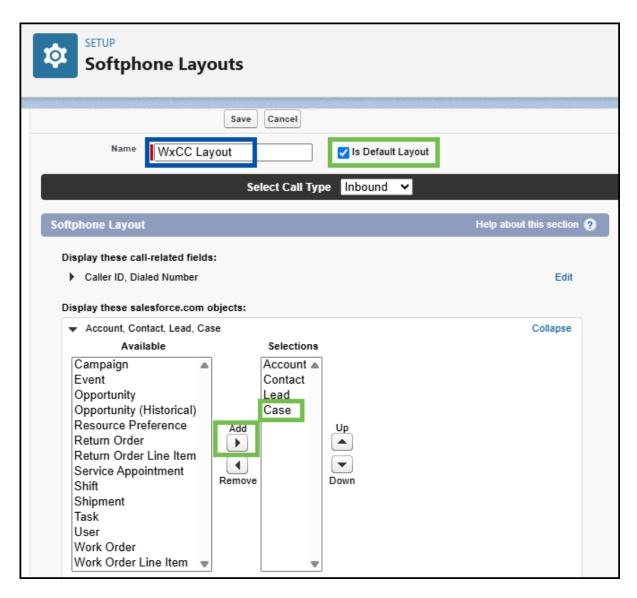
1.2.2 Section 2 - Configure Softphone Layout

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

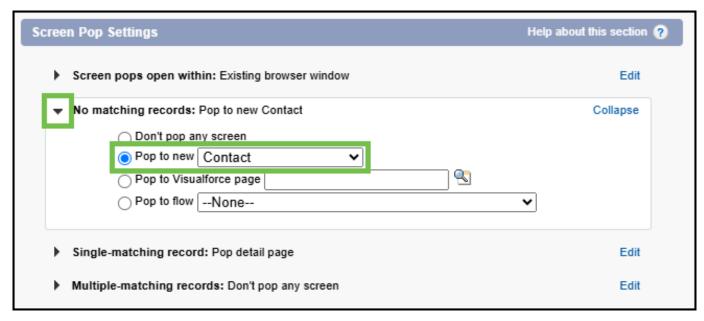


- Provide a name for the 'Softphone Layout' (e.g., WxCC layout).
- Select the 'Is Default Layout' checkbox.
- Under 'Display these salesforce.com objects', click on 'Add/Remove Objects' and add 'Case'.





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



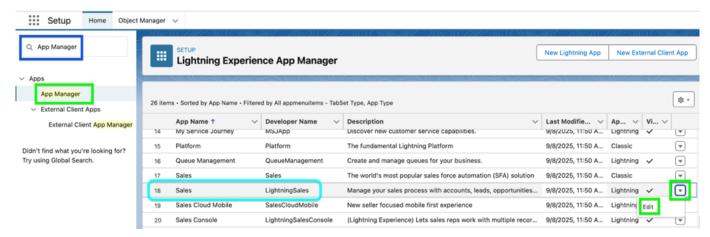


Other Salesforce objects can be selected here as well. 'Contact' is used as an example in this exercise.

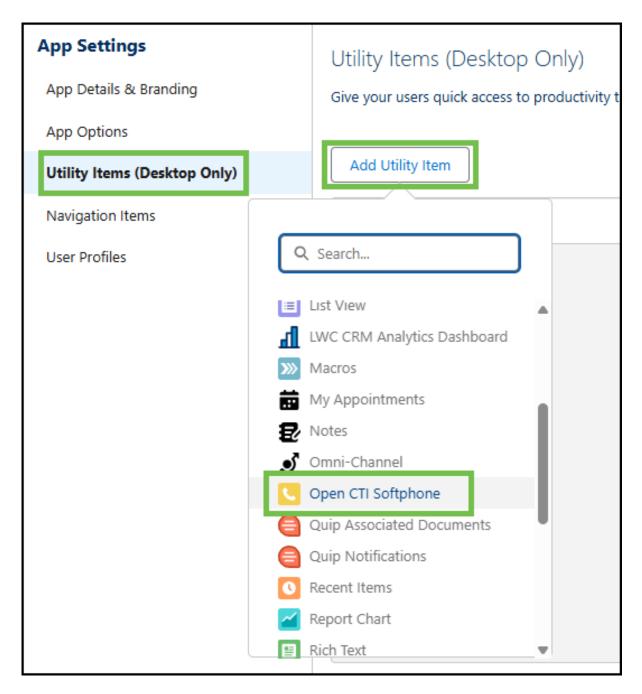
• Click 'Save' at the top.

1.2.3 Section 3 - Configure CTI Softphone

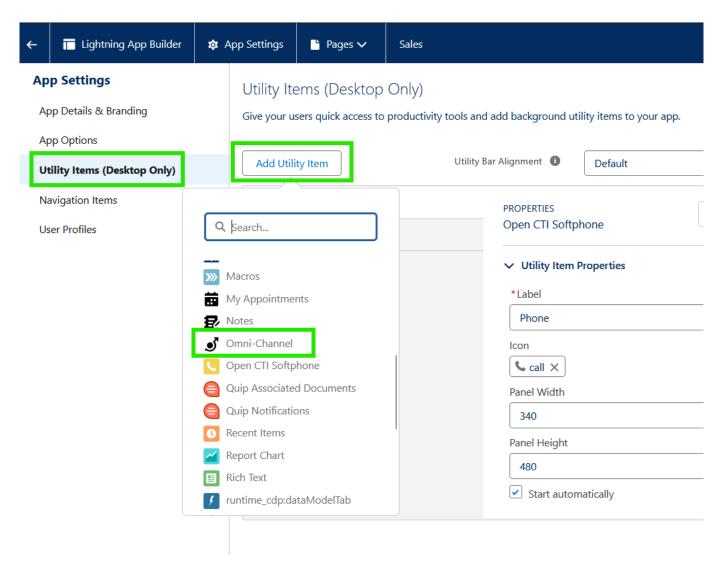
- Navigate to 'Apps > App Manager' (or type App Manager in the search bar above the left-hand menu).
- For the 'Sales' app (line number 18; 'LightningSales' developer) click 'Edit' on the right-hand side.



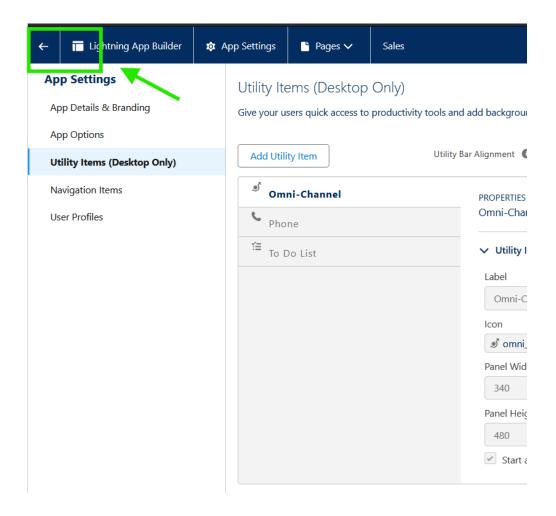
- In the next window, select 'Utility Items (Desktop Only)'.
- Click 'Add Utility item' and choose 'Open CTI Softphone'.



 • 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.

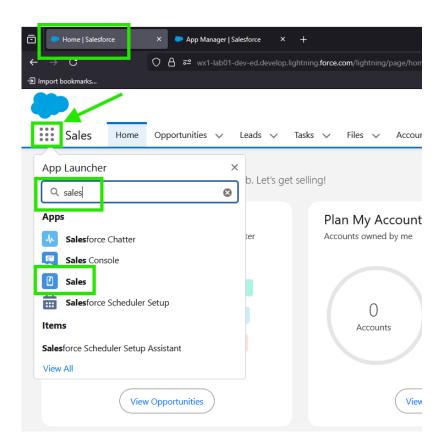


1.2.4 Section 4 - Testing

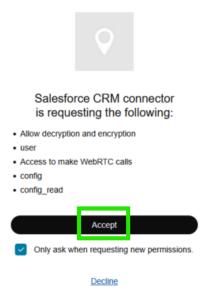


Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

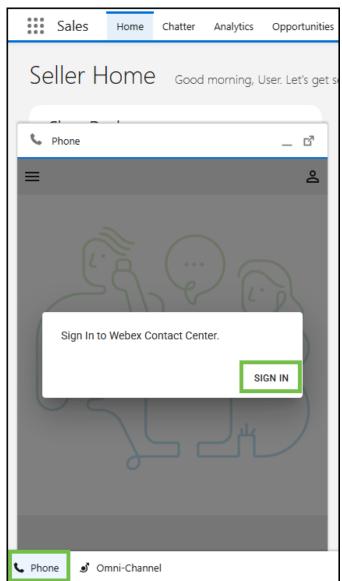
- From the Salesforce Home page, click on the 'App Launcher' icon (top left).
- Search for Sales and click on the 'Sales' option.

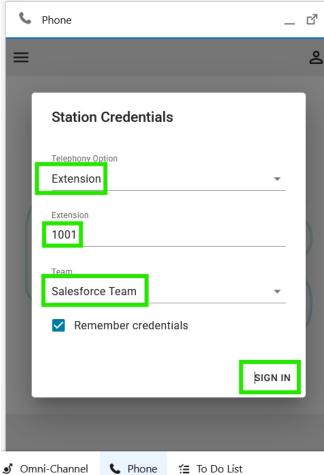


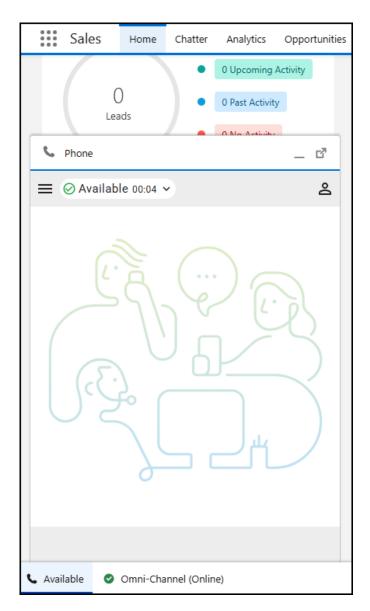
- Open the Webex Contact Center phone widget (bottom left) and login to Webex Contact Center Agent Desktop using the selected Webex Contact Center user credentials (e.g., labuserID@wx1.wbx.ai):
- First time login into agent desktop could prompt you the OAuth2 Consent as shown in the first screenshot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







 \bullet Congratulations! You have complete the task.

1.3 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 selecte	ed pod is 2)
WxCC Password	webexONE1!		
Salesforce	labuser ID @wx1.wbx.ai	Ê	(where ID is your selected pod number
Username	(01 through 30); i.e. labuser 02 @wx1.wbx.ai if selected pod is 2)		
Salesforce	webexONE1!	Î	
Password			

lsk Objectives

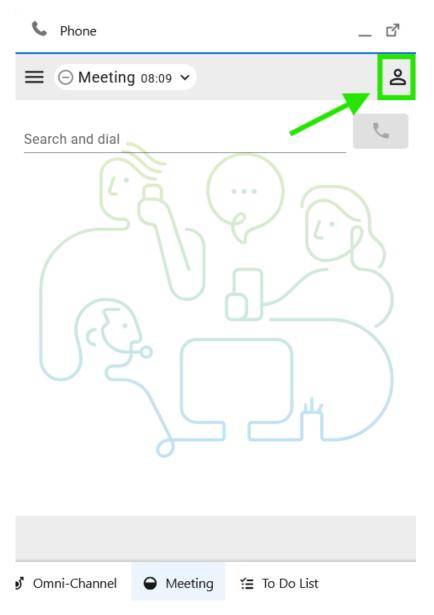
- Login with WebRTC on Salesforce.
- Troubleshoot and configure the steps needed to enable WebRTC login

1.3.1 Section 1 - Using WebRTC Option

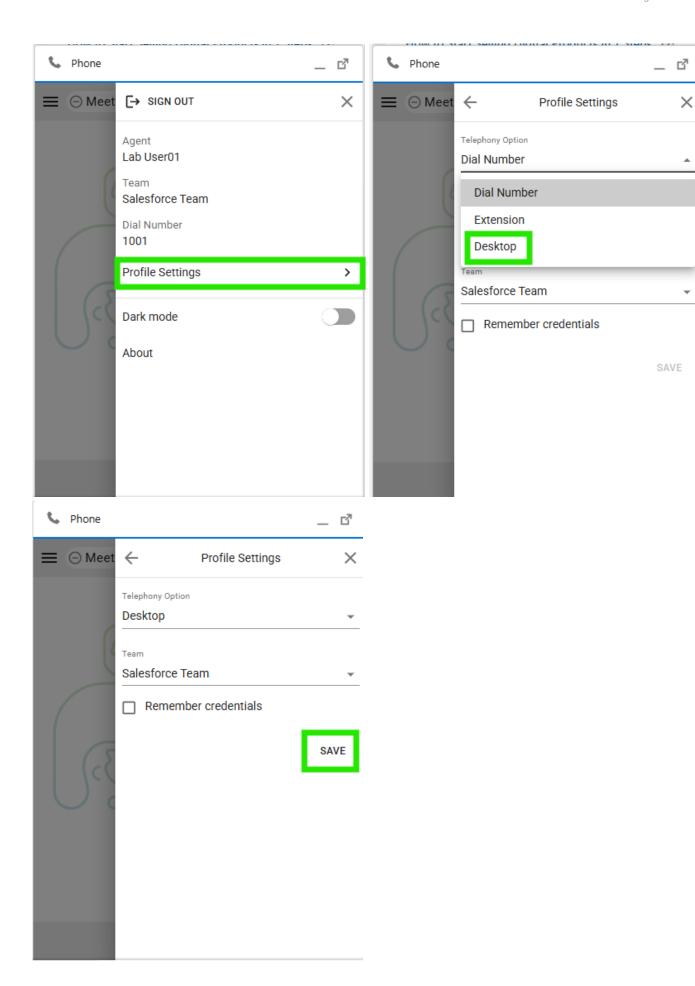


Please use the ${\bf Firefox}$ browser to access, configure, and test within the Salesforce portal.

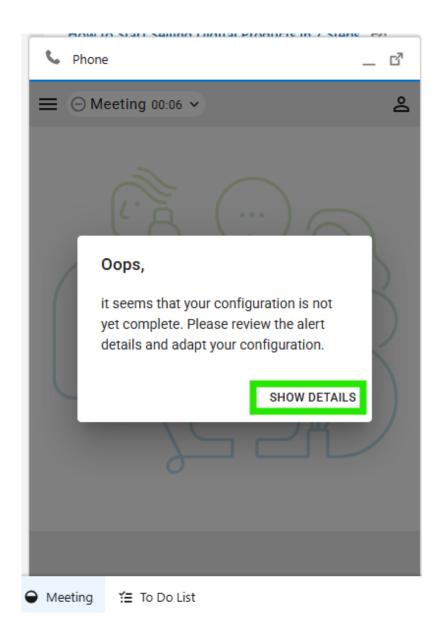
• Navigate to Agent Desktop and select the Avatar on the top right

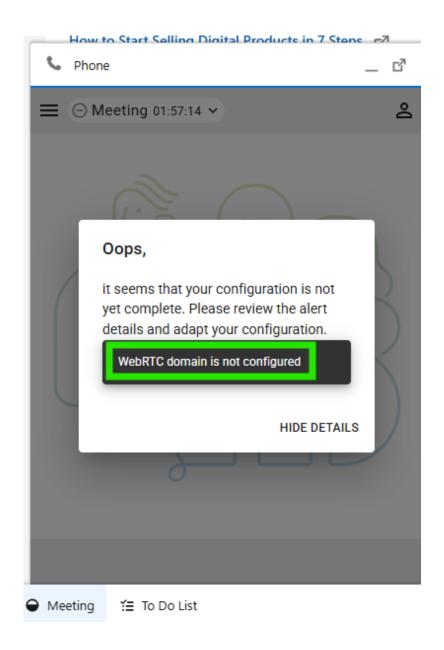


• Navigate to 'Profile Settings > Desktop > Save' (or type Call Centers in the search bar above the left-hand menu).



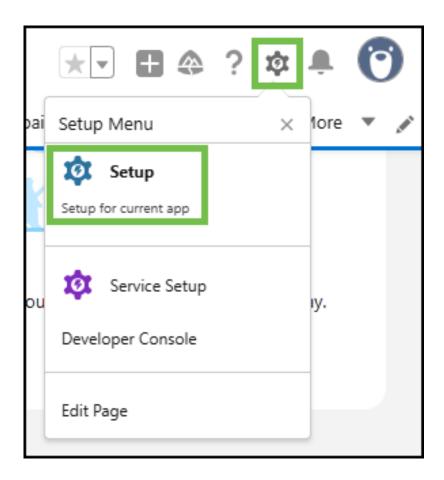
 \bullet Once the Save button is hit, the error message pops up "WebRTC domain is not configured"



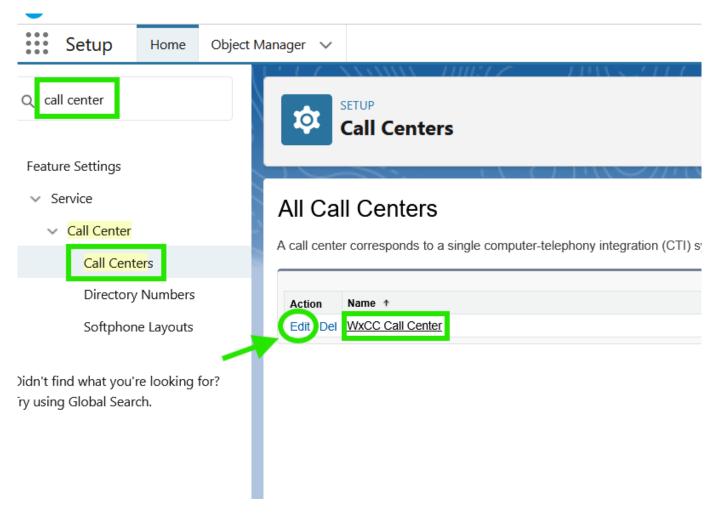


1.3.2 Section 2 - Steps to Correct and Enable WebRTC Login

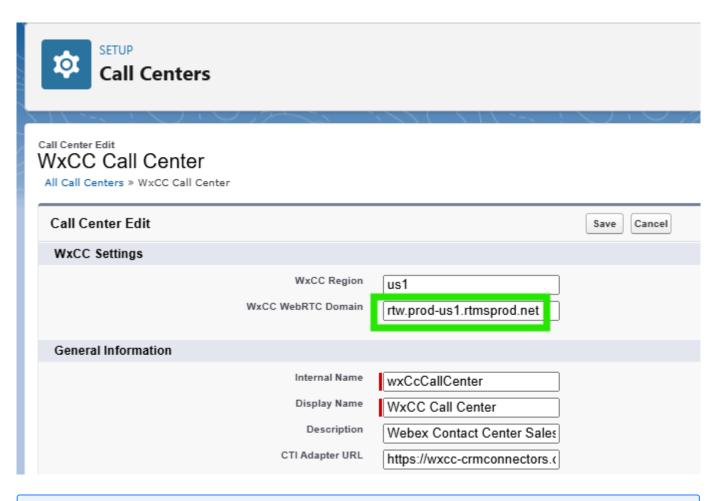
• In order to mitigate this issue, in Salesforce, navigate to 'Setup' by clicking the gear icon in the top-right corner and selecting 'Setup'.



- 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



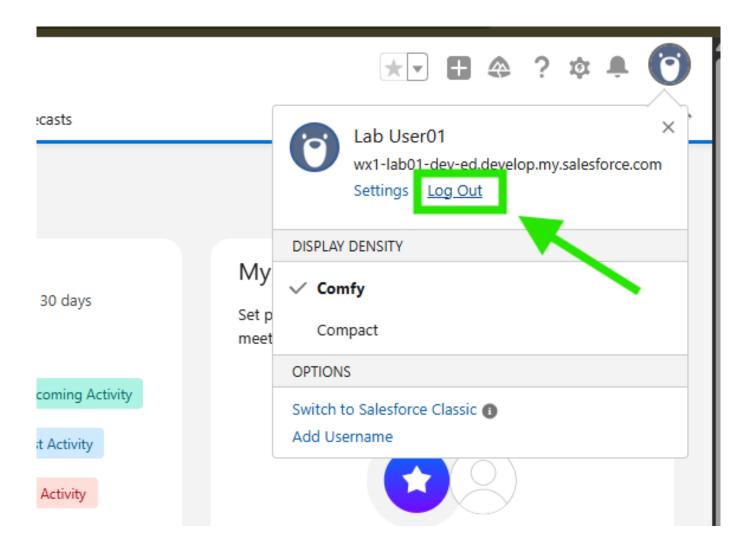
 \bullet Enter 'rtw.prod-us1.rtmsprod.net' in the 'WxCC WebRTC Domain'



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'.
- \bullet Logout and log back in to sales force.

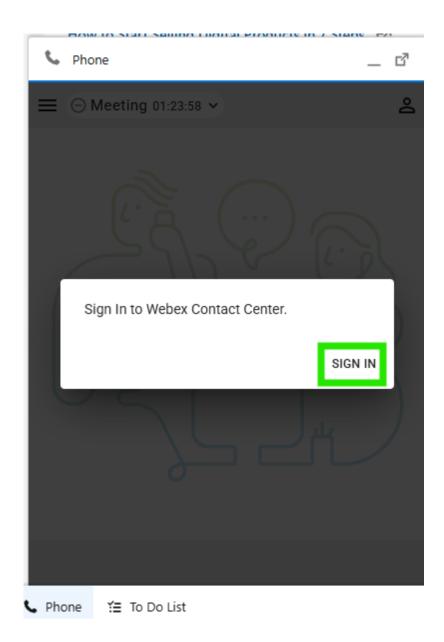


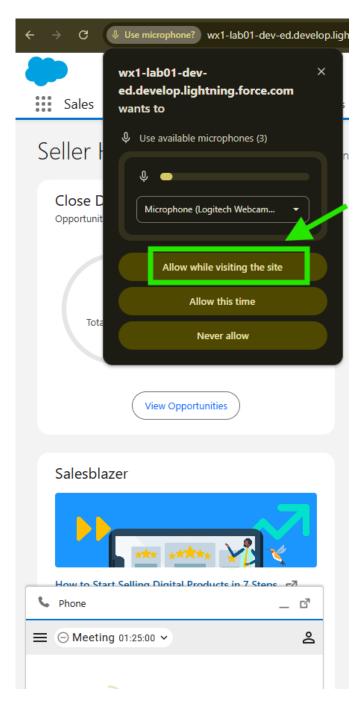
1.3.3 Section 3 - Testing



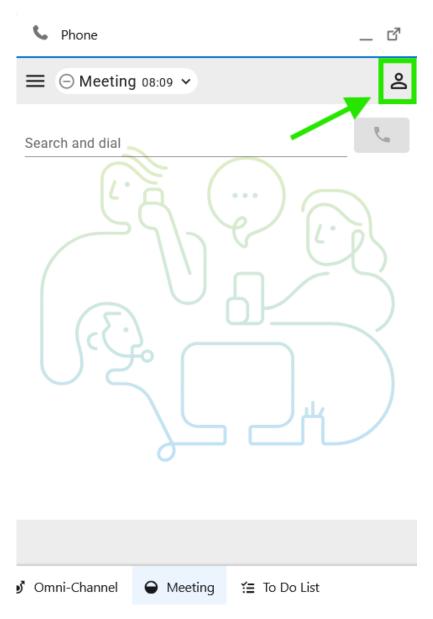
Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

- 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.

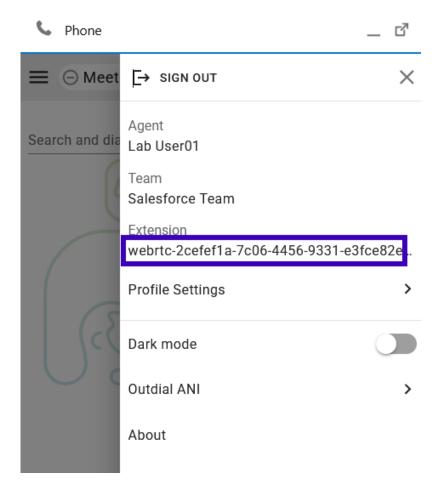




• Navigate to Agent Desktop and select the Avatar on the top right



• Notice the agent is now setup with WebRTC



• Congratulations! You have complete the task.

1.4 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	I	
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	labuserID@wx1.wbx.ai (01 through 30); i.e. labuse	📋 r 02 @wx1.wbx.ai if selec	(where ID is your selected pod number ted pod is 2)
Salesforce Password	webexONE1!	Ė	



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.

Ask 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.

1.4.1 Section 1 - Create Presence Statuses

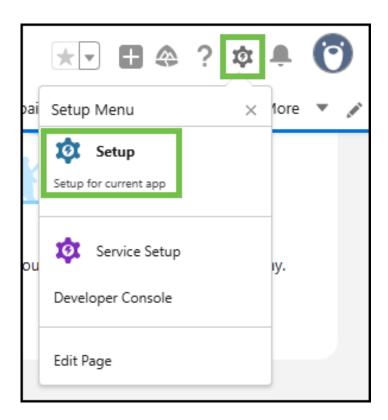


Please use the Firefox browser to access, configure, and test within the Salesforce portal.

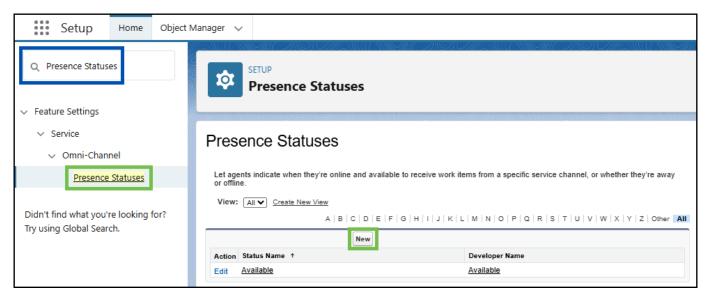


For presence synchronization to work between Salesforce and Webex Contact Center, the idle code names in Webex Contact Center must match the presence state names in Salesforce.

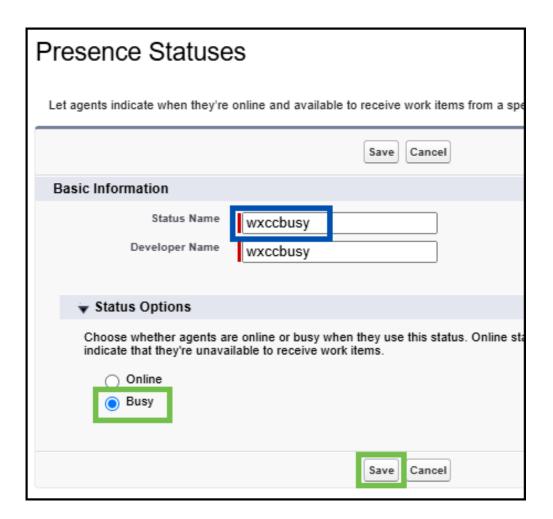
• In Salesforce, navigate to 'Setup' by clicking the gear icon in the top-right corner and selecting 'Setup'.

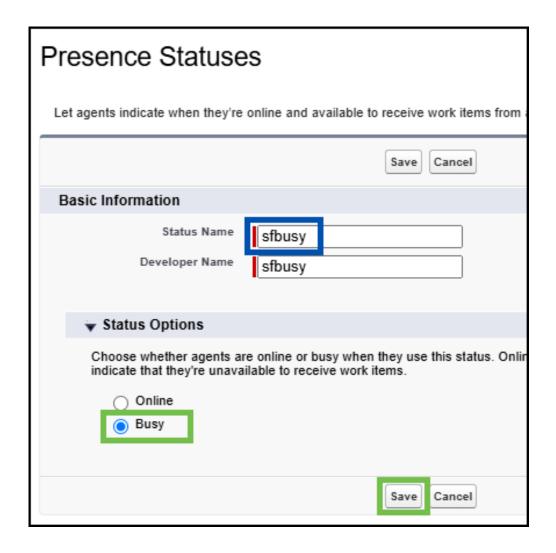


• Go to 'Feature Settings > Service > Omni-Channel > Presence Statuses' (or type *Presence Statuses* in the search bar in the left-hand menu).



- 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'.



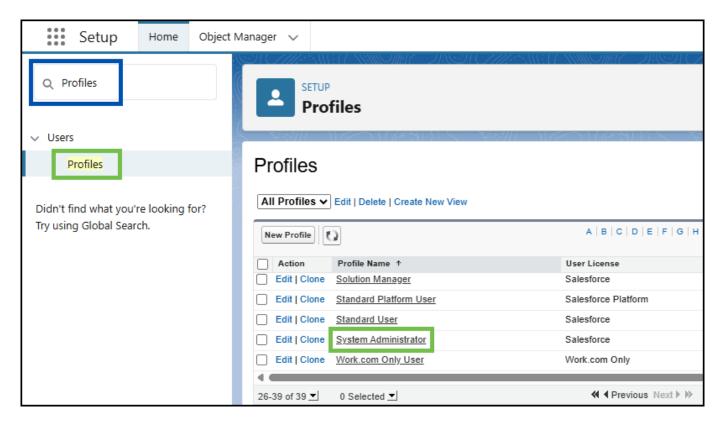


1.4.2 Section 2 - Enable Presence Statuses for the User Profile

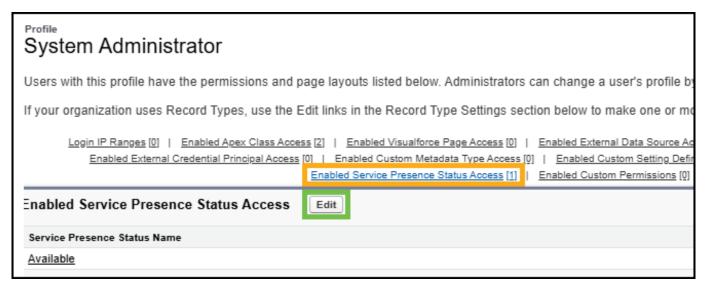
- Navigate to 'Users > Profiles' (or type *Profiles* in the search bar in the left-hand menu).
- Locate the 'System Administrator' profile (select Next at the bottom to go to the next page) and click on it (do not click 'Edit').



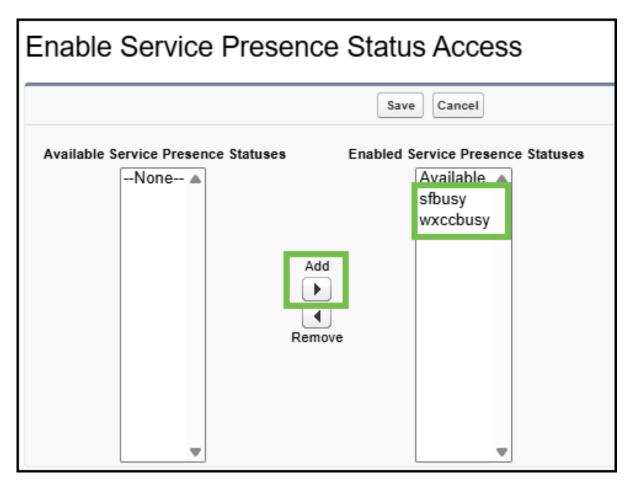
For the purpose of this exercise, the 'System Administrator' profile is used. Under normal circumstances, any other profile may be used by users.



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



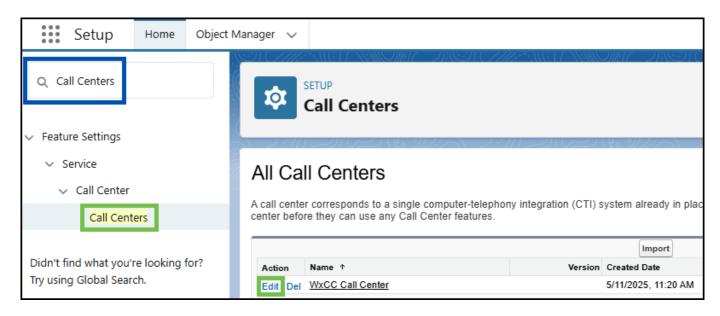
· Move sfbusy and wxccbusy from 'Available Service Presence Statuses' to 'Enabled Service Presence Statuses'.



• Click 'Save'.

1.4.3 Section 3 - Configure Omni-Channel State Sync in Call Center Settings

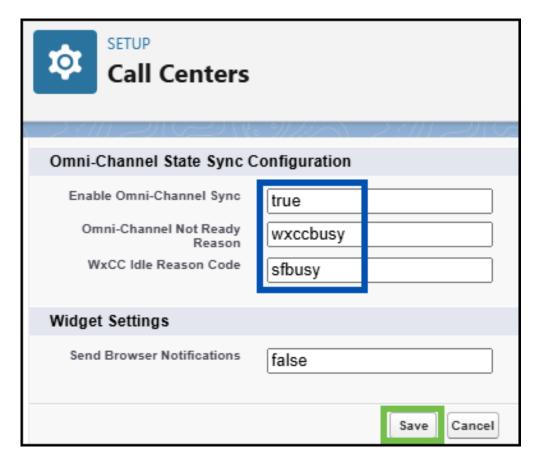
- Navigate to 'Feature Settings > Service > Call Center > Call Centers' (or type Call Centers in the search bar in the left-hand menu).
- Click 'Edit' for 'WxCC Call Center'.



- 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'.



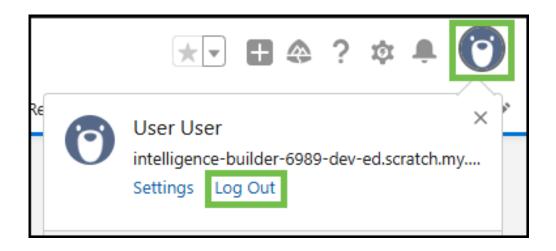
For the purpose of this lab, the idle code **sfbusy** has already been created on the Webex Contact Center side.

1.4.4 Section 4 - Testing Omni Sync Presence



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

 $\bullet \ \ {\rm Refresh\ Sales force\ by\ logging\ out\ and\ logging\ back\ in\ (\textbf{make\ sure\ to\ close\ any\ other\ Sales force\ tabs}).}$



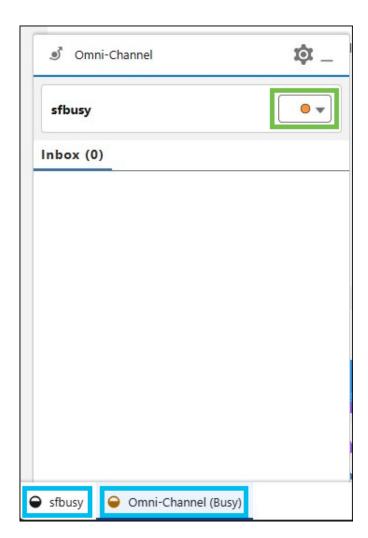
Keminder

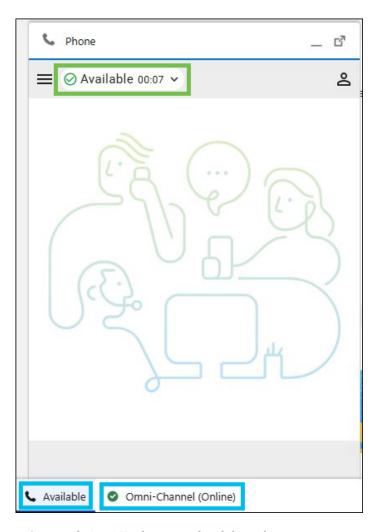
Please select the ${}^{\mbox{\scriptsize 'Desktop'}}$ option for the phone number.

- 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)

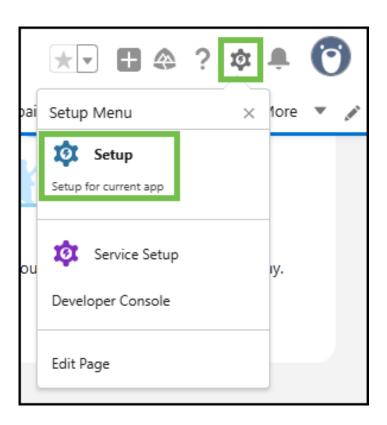




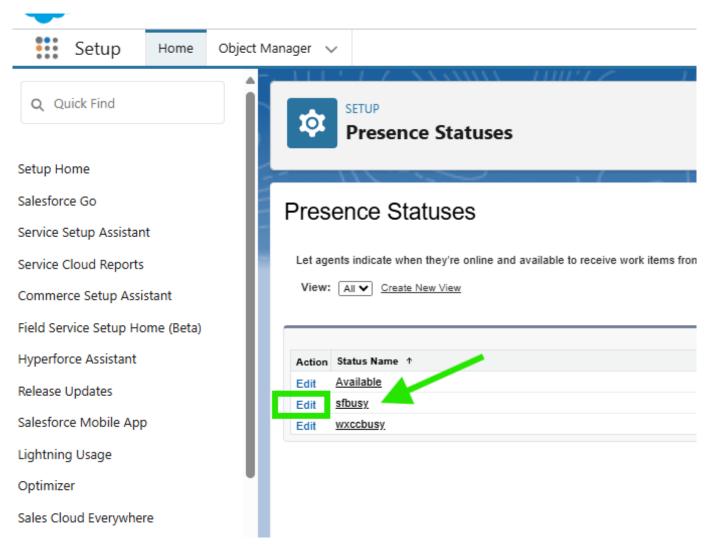
 \bullet Congratulations! You have completed the task.

1.4.5 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'.



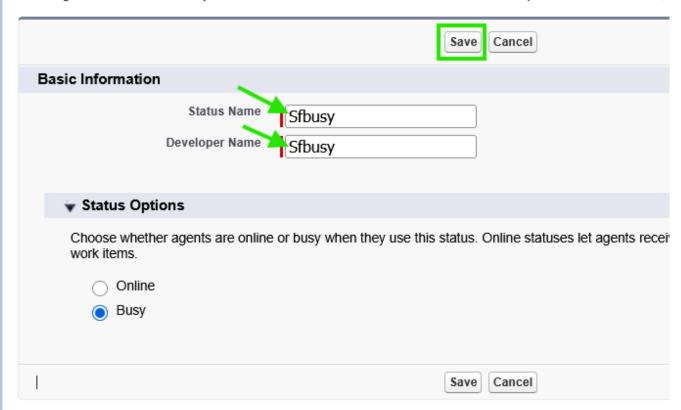
- Go to 'Feature Settings > Service > Omni-Channel > Presence Statuses' (or type *Presence Statuses* in the search bar in the left-hand menu).



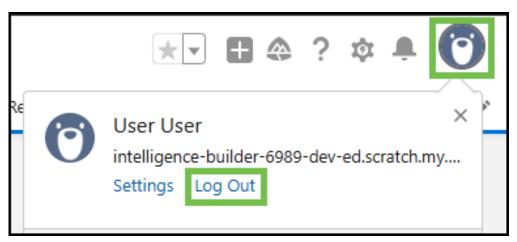
 \bullet Update sfbusy to Sfbusy (capitalizing the letter S) and click 'Save'.

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 thatthe Webex Contact Center widget still shows as 'Available'



Aason

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.

1.5 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	I	
WxCC Username	labuserID@wx1.wbx.ai (01 through 30); i.e. labuse	Î r 02 @wx1.wbx.ai if selec	(where ID is your selected pod number ted pod is 2)
WxCC Password	webexONE1!		
Salesforce Username	labuserID@wx1.wbx.ai (where ID is your selected pod number (01 through 30); i.e. labuser02@wx1.wbx.ai if selected pod is 2)		
Salesforce Password	webexONE1!	Ė	



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.

Ask Objectives

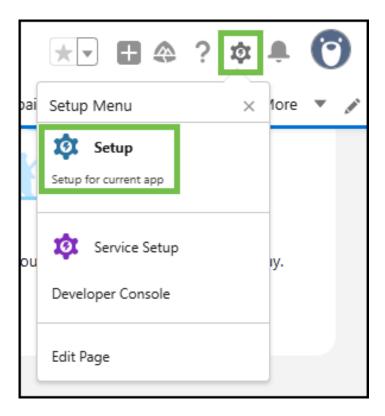
- Configure Call Center in Salesforce for advanced screen pop functionality.
- Customize and publish a Webex Contact Center flow with Salesforce integration.
- Test the integration by triggering a Salesforce contact creation via a phone call.

1.5.1 Section 1 - Salesforce Configuration

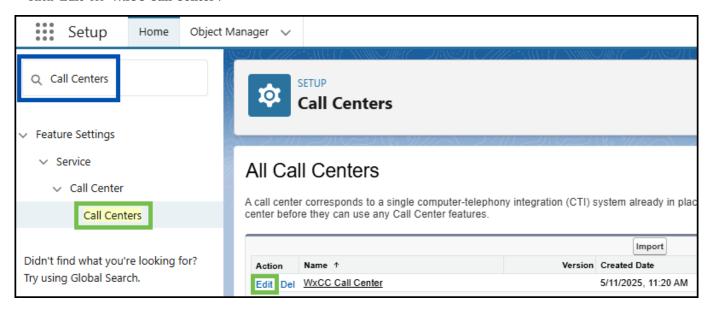


Please use the Firefox browser to access, configure, and test within the Salesforce portal.

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

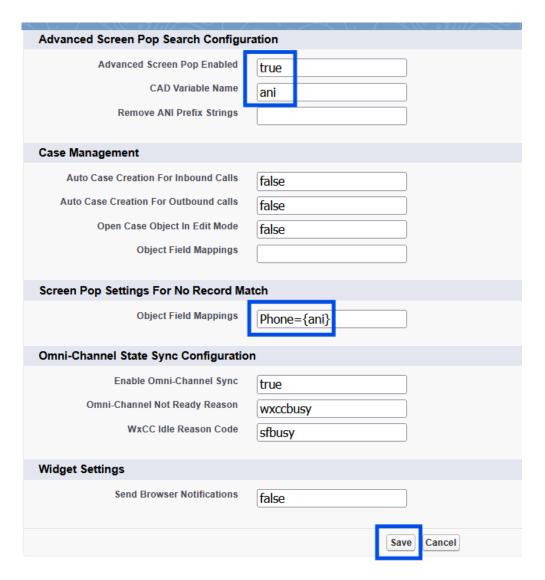


- Go to 'Feature Settings > Service > Call Center > Call Centers' (or type Call Centers in the search bar in the left-hand menu).
- Click 'Edit' for 'WxCC Call Center'.



- 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:

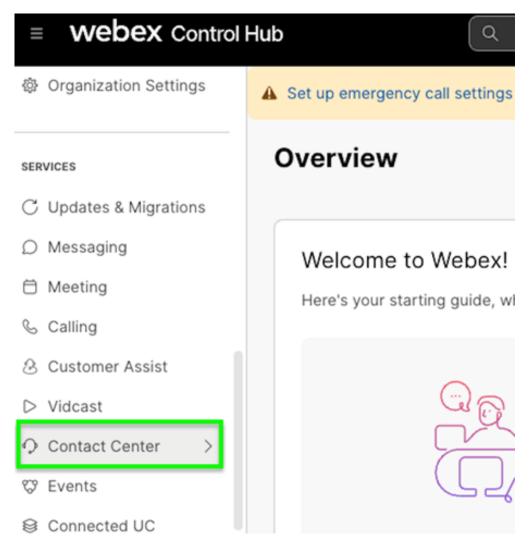
Phone={ani}



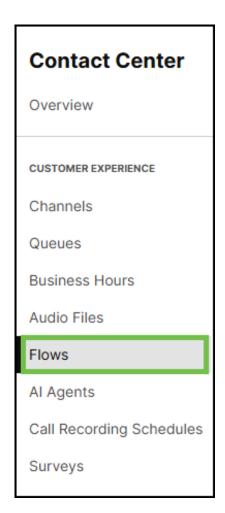
• Click 'Save'.

1.5.2 Section 2 - Webex Contact Center Configuration

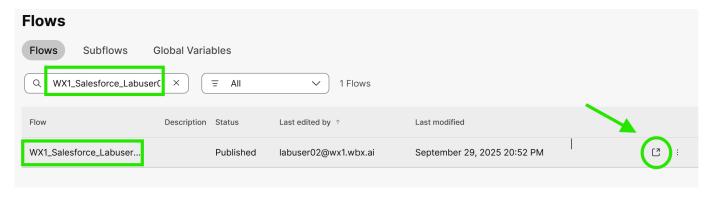
- \bullet Log in to the https://admin.webex.com using the credentials provided at the top of this page.
- Click on Contact Center in the left-hand side navigation pane of the Webex Control Hub.

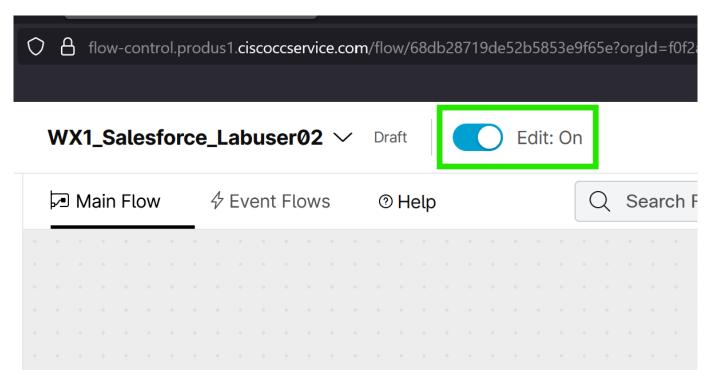


• After logging in, navigate to the 'Flows' menu on the left-hand side.



• 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.

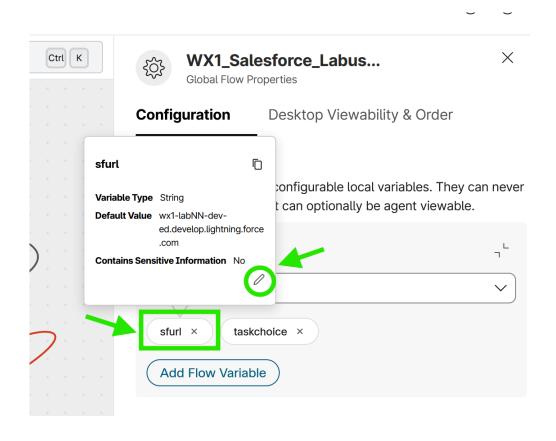


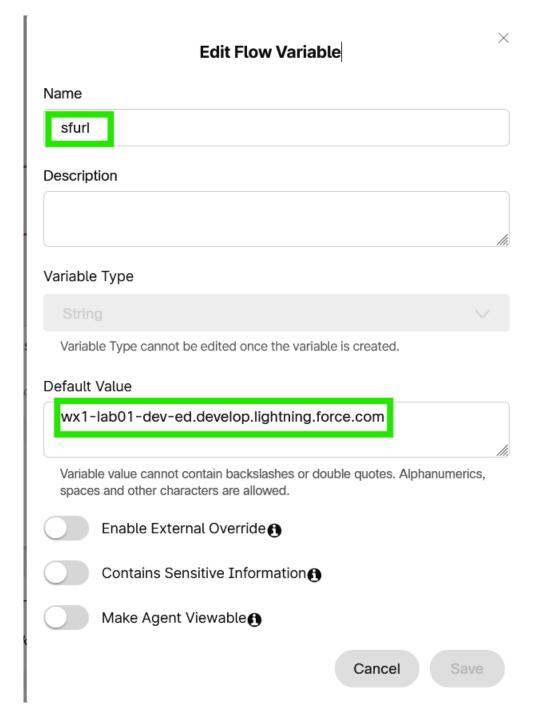


- Click on an empty space in the flow, then on the right-hand side, scroll down to navigate to 'Custom Variables' Flow Variables' section.
- Click on **sfurl** flow variable, select the '**Edit'** option (pencil icon), replace **NN** with the attendee number which is the fully qualified domain name (FQDN)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

Atention

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**.





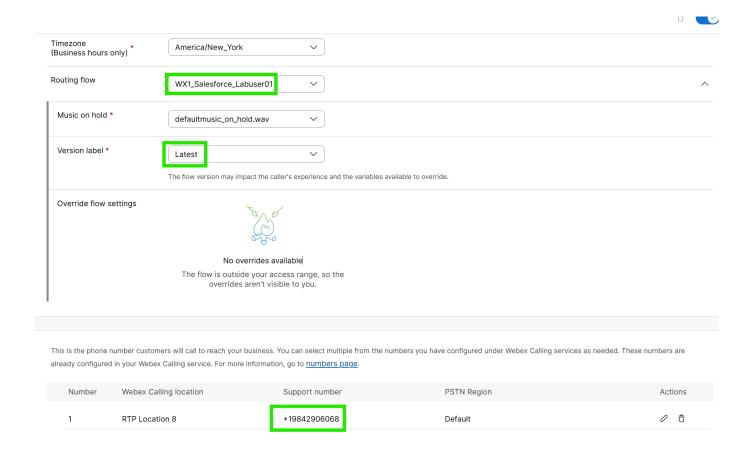
• Turn Flow Validation 'On' by clicking the 'Validation' button at the bottom of the page to publish the flow. Once validation is complete, click 'Publish Flow' and then 'Publish Flow' again in the next dialog box (Latest version label is selected automatically).



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

Contact Center Overview CUSTOMER EXPERIENCE Channels Queues Business Hours Audio Files Flows Al Agents Call Recording Schedules Surveys

- 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'
- $\bullet \ \ Note \ down \ the \ \textbf{'Support Number'} \ associated \ with \ this \ channel \ \ it \ will \ be \ needed \ later \ in \ this \ lab \ for \ testing.$

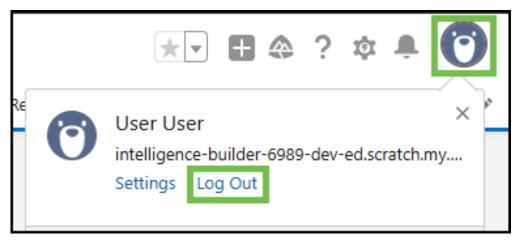


1.5.3 Section 3 - Testing

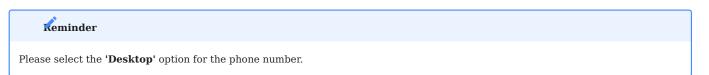


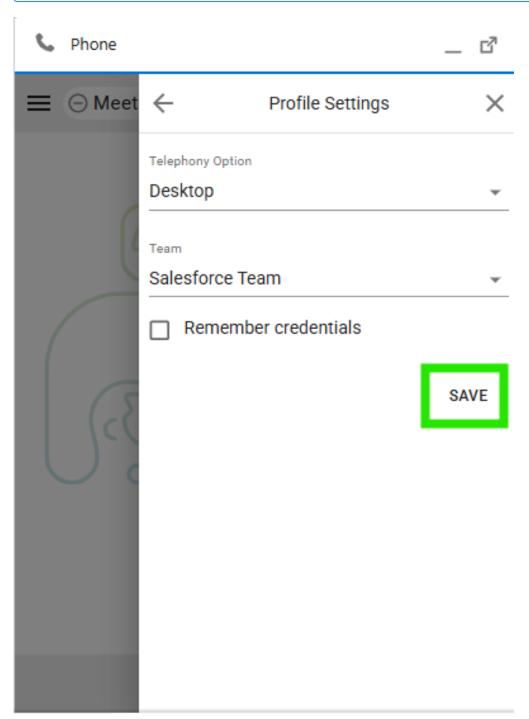
Please use the Firefox browser to access, configure, and test within the Salesforce portal.

 $\bullet \ \ \text{Refresh Salesforce by logging out and logging back in } \\ (\textbf{make sure to close any other Salesforce tabs}).$

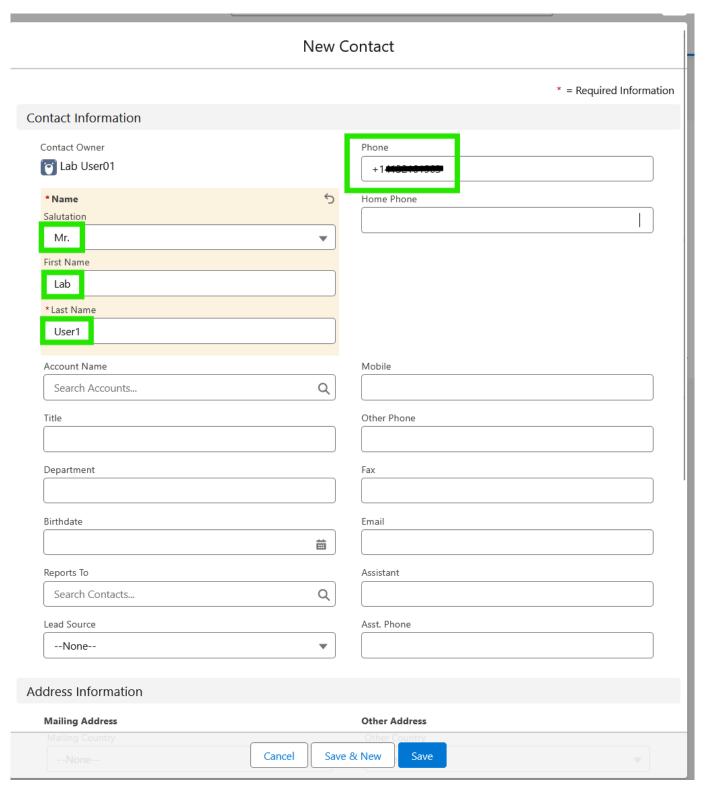


- Open the Webex Contact Center phone widget and login using the selected Webex Contact Center credentials.
- For the team use Salesforce Team.

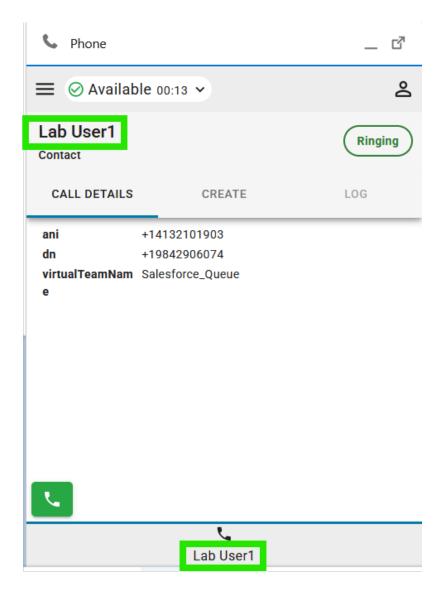




- Make sure that the agent state is set to 'Available' and then call the channel number (noted from the steps above). In the IVR, choose **option 4**.
- Since Salesforce does not recognize your number, a new Contact create window will open with the phone number prefilled.
- Provide a name and save the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



- 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.

1.6 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	I	
WxCC Username	labuserID@wx1.wbx.ai (01 through 30); i.e. labuse	Î r 02 @wx1.wbx.ai if selec	(where ID is your selected pod number ted pod is 2)
WxCC Password	webexONE1!		
Salesforce Username	labuserID@wx1.wbx.ai (where ID is your selected pod number (01 through 30); i.e. labuser02@wx1.wbx.ai if selected pod is 2)		
Salesforce Password	webexONE1!	Ė	



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.



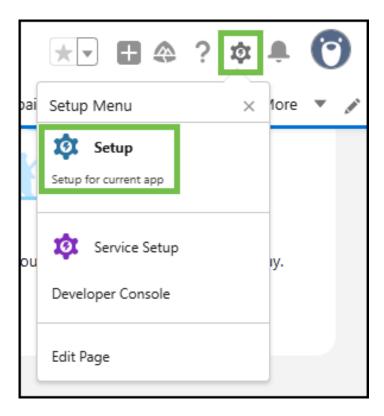
- Update Salesforce Call Center settings to enable advanced screen pop with the case variable.
- Test case creation and retrieval in Salesforce via the Webex Contact Center phone widget.
- Have the case list open in a new tab during case retrieval.

1.6.1 Section 1 - Modifying Call Center Options in Salesforce

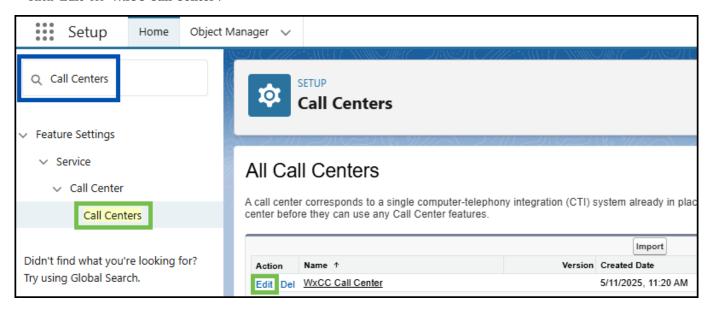


Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

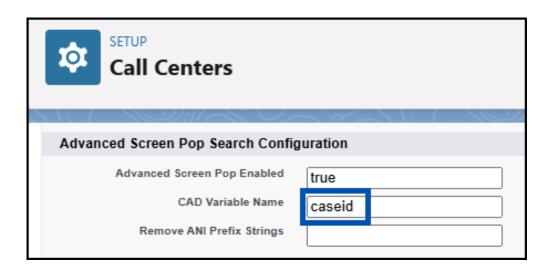
• Navigate to 'Setup' by clicking the gear icon in the top-right corner and selecting 'Setup'.



- 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'

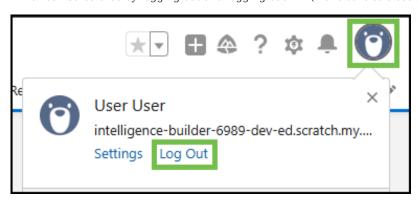


1.6.2 Section 2 - Testing

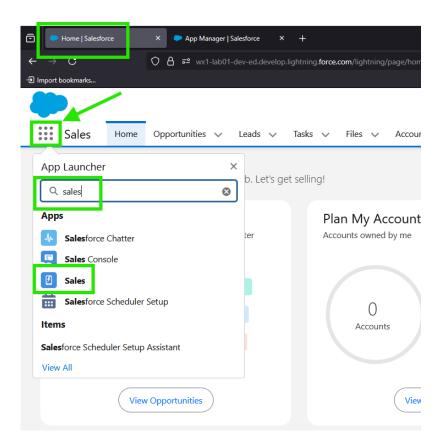


Please use the **Firefox** browser to access, configure, and test within the Salesforce portal.

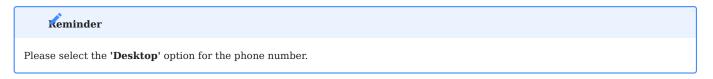
• Refresh Salesforce by logging out and logging back in (make sure to close any other Salesforce tabs).



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

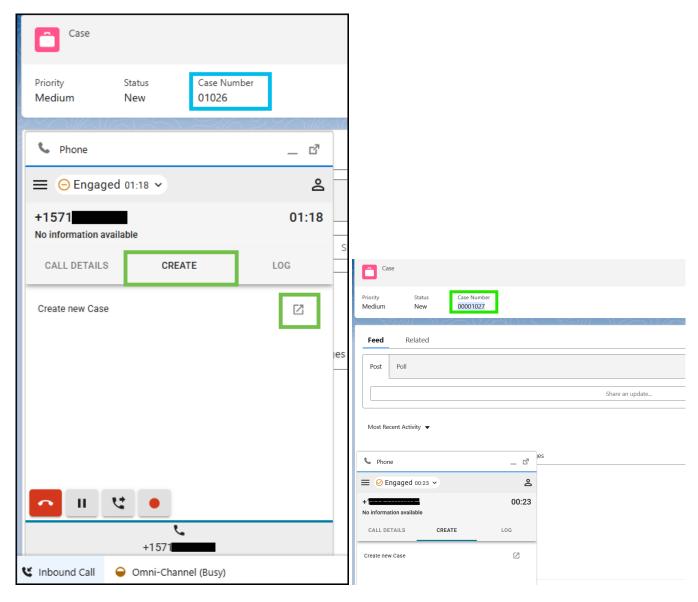


- Open the Webex Contact Center phone widget and login using the selected Webex Contact Center credentials.
- For the team use **Salesforce_Team**.



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.

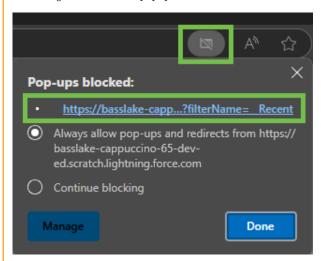


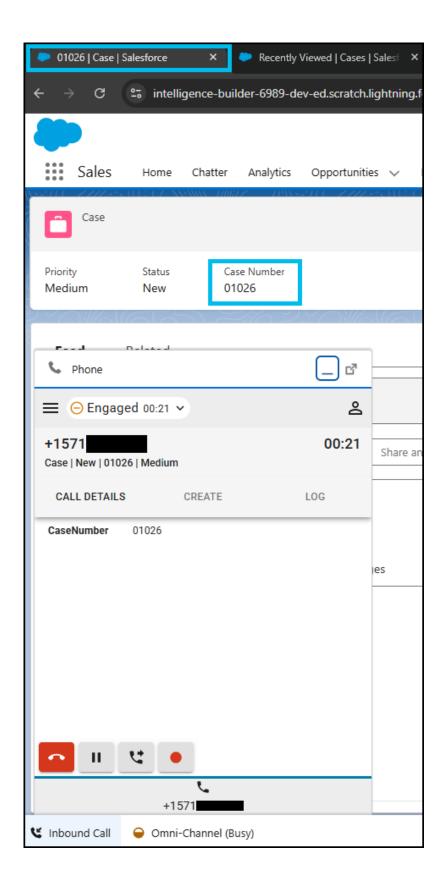
Second call interaction:

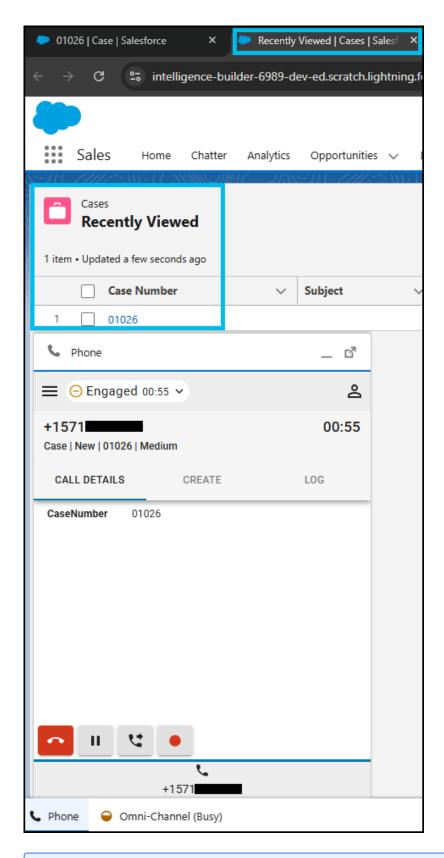
- Make sure that agent state is set to 'Available' and then call the channel number again. In the IVR, choose Option 5.
- \bullet Provide the case number that was created during the previous call.
- The existing case should be displayed, and the case list should be displayed in a new tab.
- Select the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



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 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.

1.7 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 selecte	ed pod is 2)
WxCC Password	webexONE1!		
Salesforce	labuser ID @wx1.wbx.ai		(where ID is your selected pod number
Username	(01 through 30); i.e. labuser 02 @wx1.wbx.ai if selected pod is 2)		
Salesforce	webexONE1!	Î	
Password			



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.



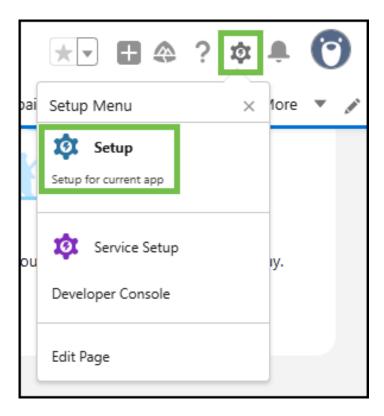
- Enable auto case creation via the Salesforce Call Center configuration file.
- Set up CAD variable field mapping for auto case creation in the Salesforce Call Center settings.
- Test the auto case creation and CAD variable field mapping.

1.7.1 Section 1 - Modifying Call Center Options in Salesforce

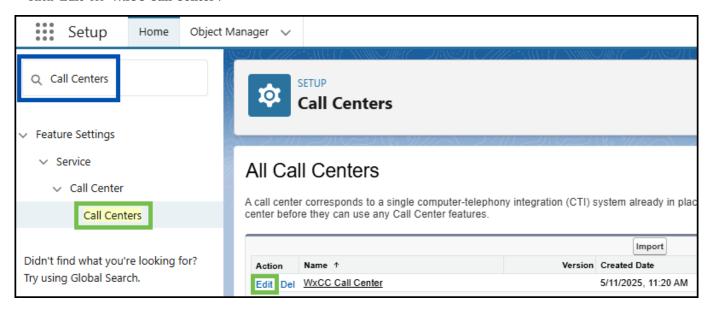


Please use the Firefox browser to access, configure, and test within the Salesforce portal.

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

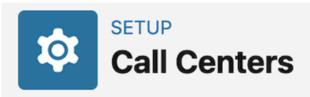


- Go to 'Feature Settings > Service > Call Center > Call Centers' (or type Call Centers in the search bar in the left-hand menu).
- Click 'Edit' for 'WxCC Call Center'.



- 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}



Advanced Screen Pop Search C	onfiguration			
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},Description			
Screen Pop Settings For No Rec	cord 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	./71 false Copyright © 2025 Cisc			