Meeting Information – January 20, 2021

Cisco Webex Contact Center Virtual Technical Partner Summit

Event number: 162 489 3285 – 10:00 am Eastern / 7:00 am Pacific

Event password: summit (786648)

* You will not hear any audio until the event begins.

If you have any technical difficulties, please contact Ken George:

Mobile: 408.894.2143

Text 704.763.4524

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Cisco Webex Contact Center Virtual Technical Partner Summit



Welcome to:

Cisco Webex Contact Center Virtual Technical Partner Summit Session 9

Your Host:

Ken George

Sales BDM, Collaboration Technology Group, Americas Partner Organization 408.894.2143 | kegeorge@cisco.com

Series Agenda

Week 1	Tuesday, January 5, 2021	CC Vision & WxCC Direction
	Wednesday, January 6, 2021	WxCC Technical Overview
	Thursday, January 7, 2021	Ordering/A2Q/Onboarding/Provisioning
Week 2		Control Hub. Admin Portal
	Wednesday, January 13, 2021	
	Thursday, January 14, 2021	
	Friday, January 15, 2021	IVR & Contact Routing
Mask 2		Agent Deckton
	Wednesday, January 20, 2021	CRM Integration
	Thursday, January 21, 2021	
	Friday, January 22, 2021	Google CCAI Integration
Week 4		Omni-channel Routing
	Wednesday, January 27, 2021	
		Webex Experience Management
	Friday, January 29, 2021	Workforce Optimization
Week 5	Tuesday, February 2, 2021	
	Wednesday, February 3, 2021	
		Security & Compliance
	Friday, February 5, 2021	Design Challenge & Build your Awesome Demo

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Partner Non-Disclosure Agreement (NDA) Review

A Gentle Reminder...

Partner Non-Disclosure Agreement (NDA)

All partners are required to have an NDA legally binding for you as a representative of the company.

As confidential information may be shared with you, the NDA protects Cisco from you sharing this information any further.

"Confidential Information" refers to:

- 1. The terms and conditions of your agreement,
- 2. The existence of the discussions between Cisco employees and you, and
- 3. Any other information concerning the confidential topics.

The Receiving Party shall only disclose Confidential Information to its employees and contractors who:

- (i) have a need to access such Confidential Information solely for the purpose in which it was intended, and
- (ii) have been advised of the obligations of confidentiality and are under obligations of confidentiality substantially similar to those set out in this Agreement.

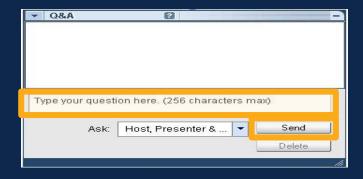
Return or destruction of confidential information is required in the event that either party terminates their NDA Agreement. Receiving Party shall:

- (i) cease using the Confidential information, and
- (ii) destroy everything within seven business days of receipt of the termination

How to ask questions during the presentation

Use the Q&A tool to submit questions at any time during the presentation (Not the chat tool)

Type your question in the text box and click SEND



OR

When in **full screen mode** use the floating toolbar to:

- a. Go from Full Screen view to Meeting Room view
- b. Access the Q&A tool







WebexCC 2.0 Salesforce Connector

GIREESH Vallatheril Babu
Solution Assurance
Contact Center Business Unit

Agenda

- 1 Feature Availability
- 2 System Architecture
- 3 Installation & Configuration
- 4 Troubleshooting
- 5 Demo & QA

Features

- Unified Agent Interface to improve agent productivity
 - WebexCC Agent Desktop application embedded inside the Salesforce CTI Panel. This helps Agents to manage both inbound and outbound interactions directly from the CRM screen and the agent doesn't need to switch between the screens
- Auto login of Agents into the Telephony Platform.
 - Allow Single sign-on to CRM and WebexCC
- · Call Controls embedded in CRM application
 - Agent Desktop embedded into the CRM application
 - Full agent state control login, station login, idle/available, logout states from WebexCC
 - o Full telephony control Answer/Hang-up, Hold/Resume, Consult/Transfer/Conference, Pause/Resume Recording and Wrap-up
- Screenpop based on incoming call ANI parameter
 - o Screenpop based on Softphone layout configuration in the CRM and customers can control the Screenpop search.
 - o Pops relevant customer record within CRM based on the call ANI parameter.
 - o It supports single record match, multiple record match and no record match scenarios and CRM administrator can control the actions for these scenarios from Softphone layout configuration.
- Automatic call logging in CRM application
 - o At the end of the connector application logs the call activity information into the CRM and tags it to relevant contact/account/lead object.
- · Outbound Calling Click to Call
 - o Click to dial enabled for all the phone number fields in the CRM and it helps the agents to initiate the out dial directly from CRM screen in single click.

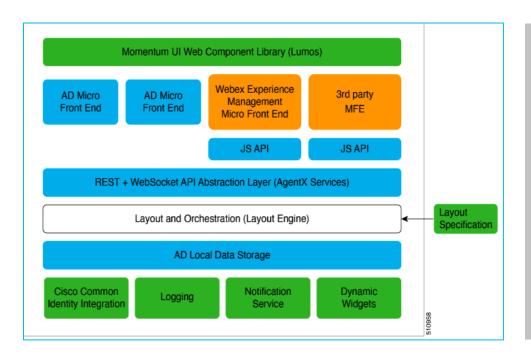
WebexCC Salesforce Connector Architecture



Business Use Cases

- Automated Screenpop based on ANI.
- Click to Dial
- Agent Activity Logging
 - Call session info
 - Custom Report

Desktop Architecture



Seven Logical Layers

- Common Services
- AD Local Data Storage
- Desktop Layout Engine
- AgentX Services
- JS API
- An array of AD MFE's
- Momentum UI Web Component Library.

Connector Installation From Salesforce AppExchange

Install Cisco Webex Contact Center for Salesforce **Before you begin**

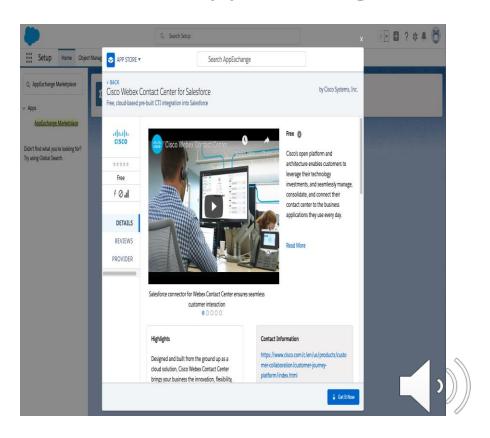
If you have an older version of Cisco Webex Contact Center App, then uninstall the old version before installing the latest version.

Procedure

- 1. Login to your Salesforce instance and Go to Setup
- In the search box, type "AppExchange Marketplace"
- 3. In the AppExchange Marketplace type "Cisco Webex Contact Center for Salesforce".
- 4. Click **Get It Now** and choose either of the options to install:

 Install in Production—Choose when you've tested and is ready to go public.

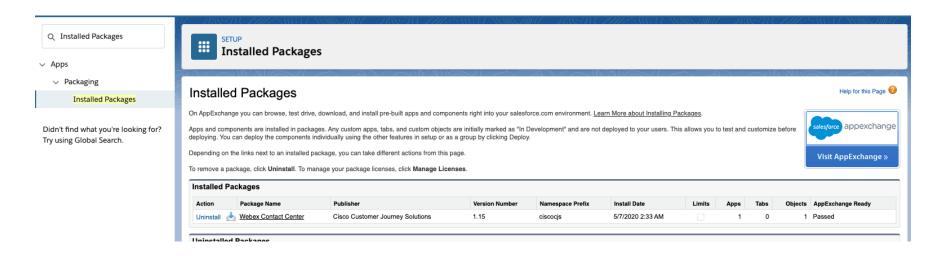
 Install in Sandbox—Choose when you've to test against a
 - Install in Sandbox—Choose when you've to test against a copy of the production org. The login URL is different for Sandbox environment. Once you've tested in the Sandbox, you must install it on a production environment using the option Install in Production.
- 5. After the installation is complete, click **Done**.



Connector Installation Verification

Procedure

- 1. In Salesforce navigate to Setup
- 2. In the search box, type "Installed Packages"
- In the Installed Package List check for "Webex Contact Center".
- 4. If found then Installation is successful



Salesforce Call Center Configuration

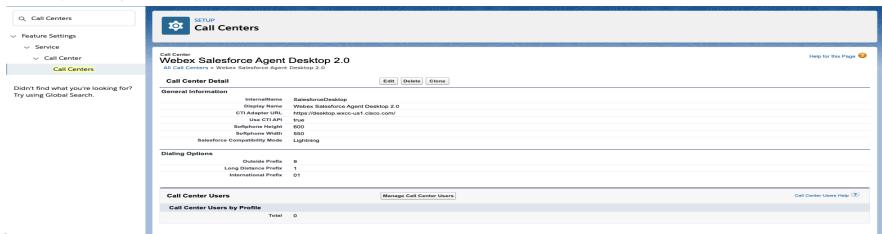
Procedure: Call Center Configuration

- In Salesforce navigate to Setup.
- 2. In the search box, type "Call Centers".
- 3. Click the **Edit** link corresponding to the Webex Contact Center.
- 4. Update the Display Name field if you want to change the Display name of the call center.
- 5. Configure the CTI Adapter URL

AppStaging: https://agentx.appstaging.ciscoccservice.com/ US: https://desktop.wxcc-us1.cisco.com/

6. Configure Softphone Layout

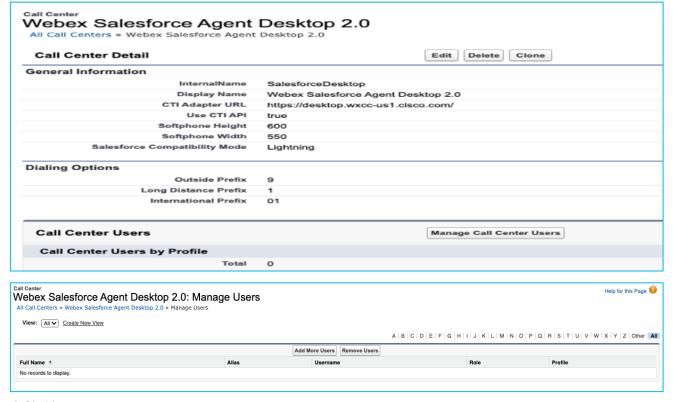
Softphone Height: 600 Softphone Width: 550



Adding Call Center Users

Procedure: Add call center users

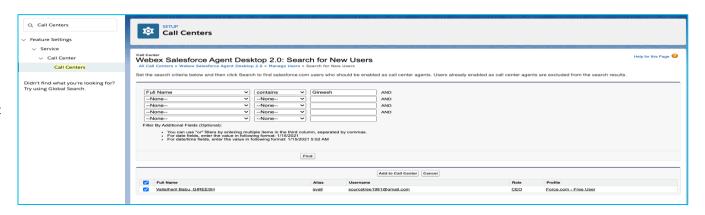
- 1. In Salesforce navigate to Setup.
- 2. In the search box, type "Call Centers".
- Clickthelink corresponding to the Webex Contact Center
- 4. Clickon the "Manage Call Center Users"
- 5. It opens the "Manage Users" page
- Click on "Add More Users" button to add users to call center application. Click on "Remove Users" button to remove users from Call Center application.



Adding Call Center Users

Procedure: Add call center users

- 7. Search Screen opens and apply the filters to find the Call Center Users.
- 8. Select the users from the list and click on the "Add to Call Center" button.
- It redirects to manage users page and it lists the all the users that are added to the call center application





Salesforce Softphone Layout Configuration

Screen Pop Settings

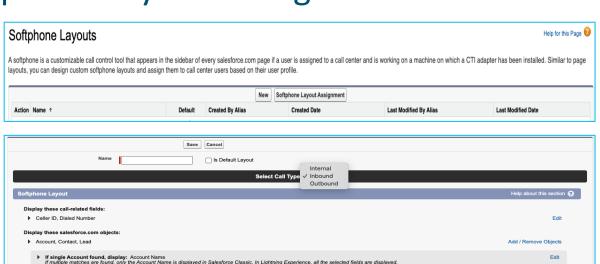
Screen pops open within: Existing browser window
 No matching records: Don't pop any screen

Multiple-matching records: Don't pop any screen

Single-matching record: Pop detail page

Procedure: Create Softphone Layout

- 1. In Salesforce navigate to Setup.
- In the search box, type "Softphone Layout".
- Click on the "New" Button, it opens the "Softphone Layout Configuration page".
- 4. Enter **Name** for the Softphone Layout Configuration.
- Select the Is Default Layout Check
 Box If you want to make this
 Softphone layout default for all the
 call center application.
- Configure the Softphone and Screenpop settings for Inbound, Outbound and Internal Calls.
- Click Save to create the Softphone Layout configuration



Edit

Edit

Help about this section ?

If single Contact found, display: Name If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

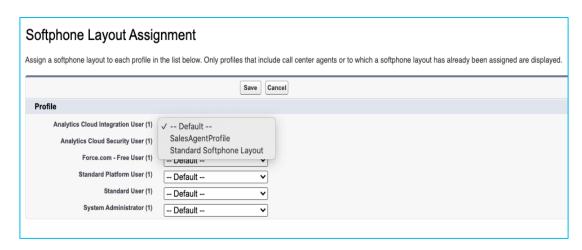
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

Salesforce Softphone Layout Configuration

Procedure: Softphone Layout Assignment

- 1. In Salesforce navigate to Setup.
- In the search box, type "Softphone Layout".
- Click on the "Softphone Layout Assignment" Button, it opens the "Softphone Layout Assignment page".
- 4. Assign the Softphone Layout configuration for each user profiles.



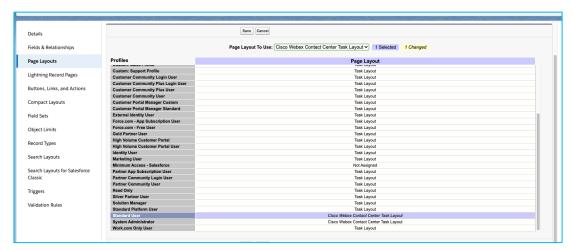


Salesforce Task Layout Configuration

Procedure: Task Layout Configuration

- 1. In Salesforce navigate to Setup.
- In the search box, type "Object Manager" and click on "Object Manager" link button.
- It opens the Object Manager list page. Filter the list page by typing "Task" in the Search box. Click on "Task" button link
- 4. It opens the Task Details page. Select the page layout.
- Click Page Layout Assignment > Edit Assignment.
- 6. Select a profile from the displayed list in the **Profiles** column.
- Select the Cisco Webex Contact Center Task Layout from the Page Layout To Use drop-down list.
- 8. Click Save to assign the Task Layout





WebexCC Salesforce Desktop Report

Procedure: Report View

- In Salesforce, click App Launcher > Webex Contact Center.
- From the Navigation Apps drop-down, select Reports.

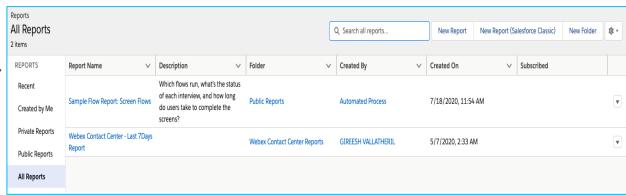
Note:

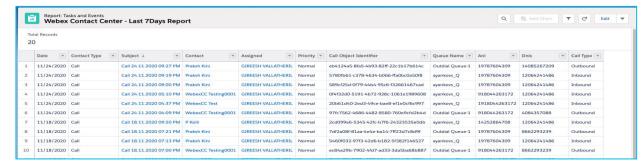
If the *reports* is not listed, click **Edit > Add More Items** and add the Reports

 To see all the existing reports, click All Reports

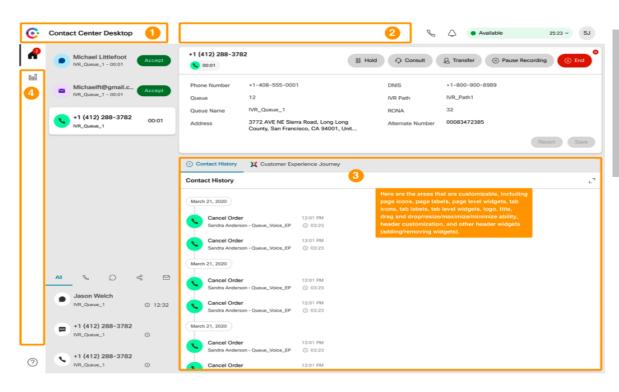
Note:

There is a default call activity report that installs with Cisco Webex Contact Center for Salesforce client.





Desktop Layout & Salesforce Desktop Layout



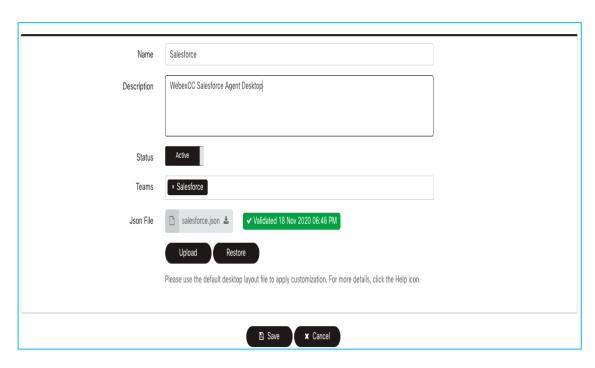
Custom Layout Details

- Information
- Header
- Headless
- Navigation
- Panel

WebexCC Salesforce Desktop Layout Configuration

Procedure: Desktop Layout Configuration

- 1. Login to WebexCC Admin Portal
- 2. Go to Provisioning > Desktop Layout > New Layout
- Enter Name and Description for the desktop layout.
- 4. Status by default will be Active.
- Add the Teams to Desktop layout.
 Agents associated with that team will get the Salesforce Desktop Layout.
- Upload the custom desktop layout for WebexCC Salesforce Desktop.
- Click Save.
- A custom Desktop Layout named Salesforce has been created in WebexCC.



Salesforce Desktop Initialization Failed

Description	Details to be checked	Mandatory Data to be Collected / Fix
WebexCC Salesforce agent desktop failed to initialize and Integration not working.	 □ Check the Call center Configuration in Salesforce. Check for the CTI Adapter URL is correct in the Call center Configuration □ Check Salesforce Desktop Web component loaded into desktop as Shadow DOM. Check for the custom element <agentx-salesforce-desktop> in the HTML elements.</agentx-salesforce-desktop> 	 □ Check the custom desktop layout for WebexCC Salesforce Desktop uploaded into the WebexCC Management Portal. □ Collect the Agent Desktop logs during the agent login.

Salesforce Desktop Screenpop failed

Description	Details to be checked	Mandatory Data to be Collected / Fix
WebexCC Salesforce agent desktop failed to perform the automated screenpop based on ANI.	 □ Check the Softphone Layout configuration in Salesforce. □ Check Phone Number of the Contact/Account/Lead object is matching with the ANI. 	☐ Collect the Agent Desktop log during the agent login.

Salesforce Desktop Click To Dial failed

Description	Details to be checked	Mandatory Data to be Collected / Fix	
WebexCC Salesforce agent desktop failed to perform the Click To Dial.		 □ Collect Tracking Id of the failure call. This will be shown to the agent as notification. □ Collect the console log for OutDial Request and use the following filter tag to collect the OutDial Request "Webexcc salesforce desktop OutDialRequest" Params: {state: "OutDialRequest", source: "salesforcedesktop", phoneNumber: "9999888823", outDialEp: "AXFOyKdd0OyccKVcLXO8", agentDN: "+1-9999888820"}" 	

Salesforce Desktop Phone call Activity Record Creation failed

Description	Details to be checked	Mandatory Data to be Collected / Fix
WebexCC Salesforce agent desktop failed to create the Phone Call Activity Record.	☐ Check the Webex Salesforce Desktop Report in Salesforce and confirm there is no activity record created for the phone call.	Collect the console log for Savelog Request and use the following filter tag to collect the OutDial Request "createActivityRecord" Params [Save Log Params] {callSessionId: "fa1d98b0-eb90-459d-8979-67e01812257e", data: {}, cti Event: "AgentWrappedUp", calltype: "OUTBOUND", ani: "9999888820",}

Demo

Questions?

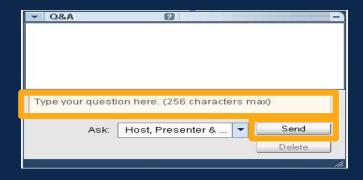
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Thank you!

Please complete the survey at the end of this session here.

We look forward to seeing you on Thursday for Session 10

