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Integrate Webex Contact Center with ServiceNow (Version 2-New)

Feedback?

When you integrate Webex Contact Center with ServiceNow, you can launch Desktop from within ServiceNow.

Requirements

```
Before you integrate Webex Contact Center with the ServiceNow console, ensure that you have the following:
```

- System Administrator access to ServiceNow instance.
- HI account to install from https://store.servicenow.com (for installing into Enterprise licensed instances).
- Access to the following files at https://github.com/webex/webex-contact-center-crm-connectors/blob/main/servicenow/updateSet.xml:
    - Cisco Click-to-dial Update Set (XML)
    - https://github.com/webex/webex-contact-center-crm-connectors/blob/main/servicenow/Global_WxCC_ClickToDial_UIMacro_UpdateSet_1.0.xml

> The update sets are only for developer instances.

Integrate

Follow one of the two methods below:

For developer instances, we recommend following the steps under the developer instance guide.

If you own an Enterprise licensed instance, follow the guidelines for enterprise-licensed instances.

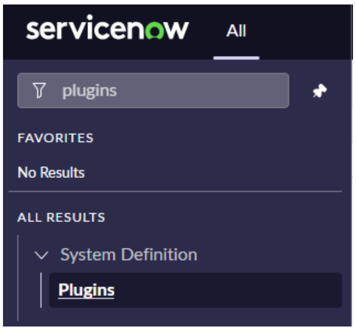
> We do not recommend mixing the enterprise-licensed app with developer sandbox instances.

Install ServiceNow for developer instances

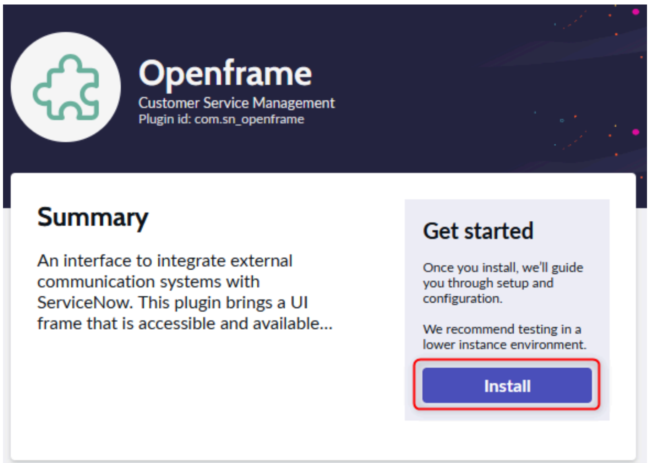
The following sections describe the steps to install the ServiceNow connector for developer instances.

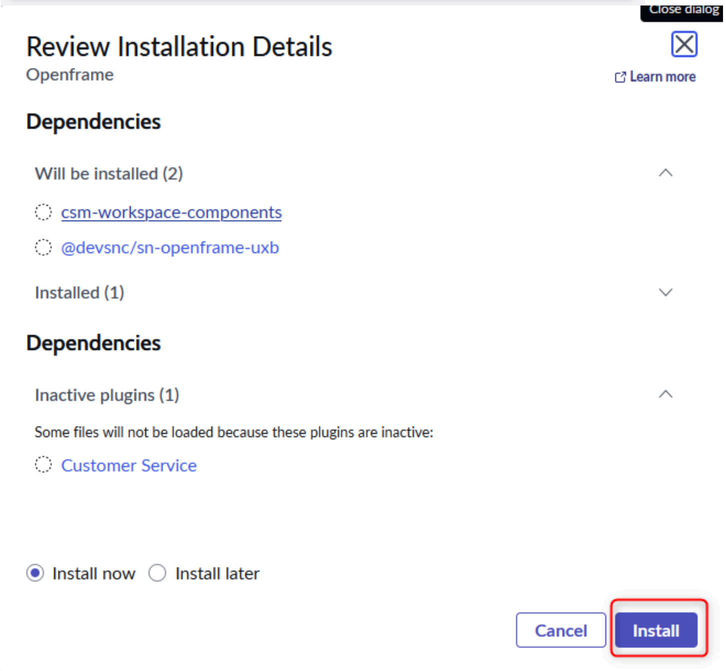
Install the ServiceNow Openframe plugin

1. Sign into your ServiceNow instance as a System Administrator.
2. Go to **All > System Definition > Plugins**.



3. Search for Openframe and install the plugin.





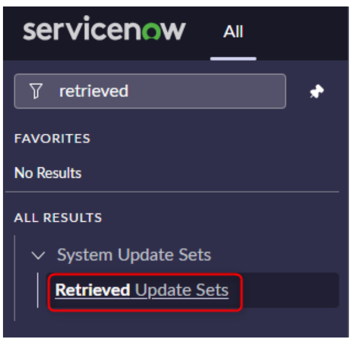
Commit the Update Set

1. Download the latest System Update Set XML file available on the github repo at this location: https://github.com/webex/webex-contact-center-crm-connectors/blob/main/servicenow/updateSet.xml.

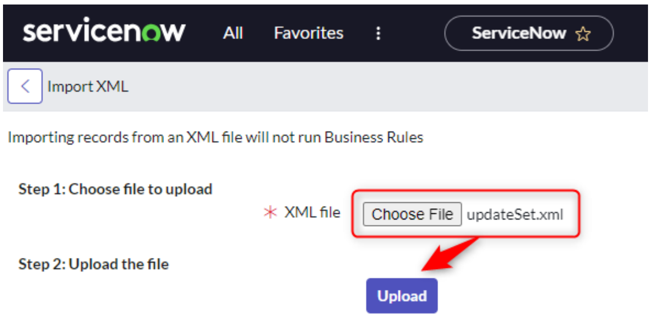
   File Name: webexcc-servicenow-update-set.xml

2. Log into your ServiceNow instance as an Administrator.

3. Go to **All > Retrieved Update Sets**.

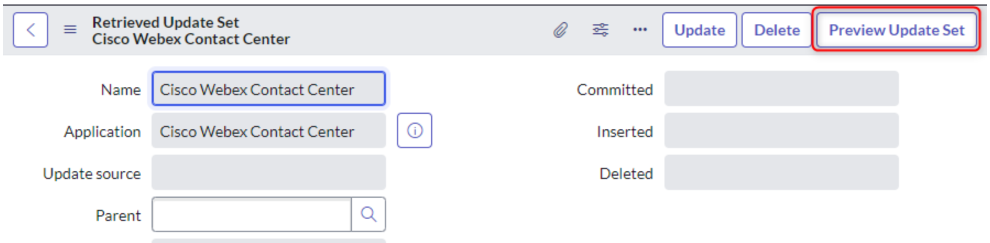


4. Click **Import Update Set** from XML and choose a file to load the .xml file.

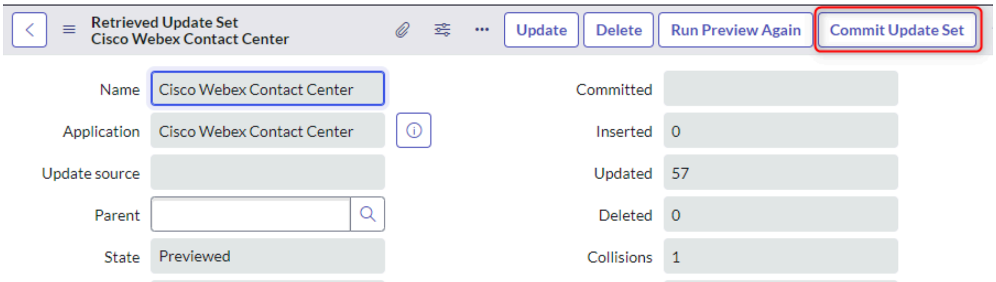


5. Click **Upload**.

6. Click on the created update set name and click **Preview Update Set.**

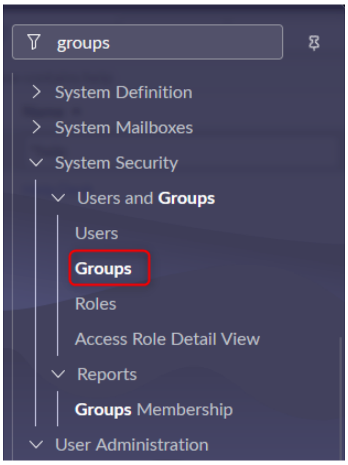


7. Finish by clicking **Commit Update Set**.

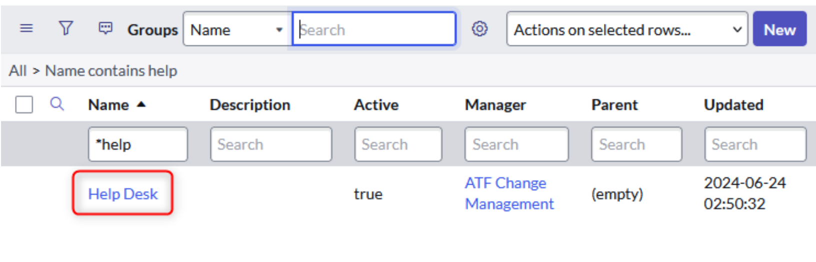


Assign Contact Center Agent Role

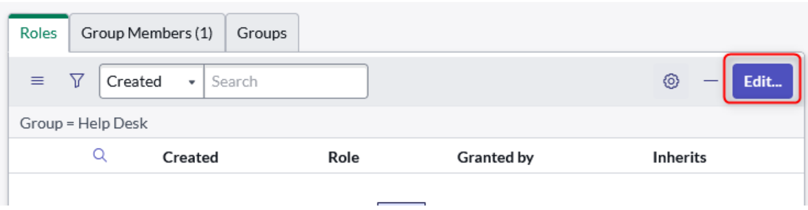
1. Go to **All > System Security > Groups**.



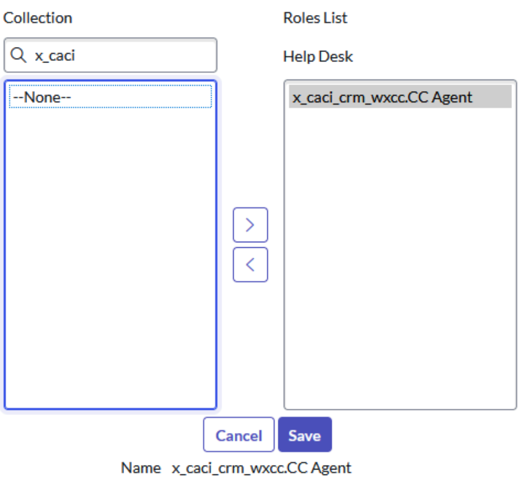
2. Search for the Group you want to edit and click the name.



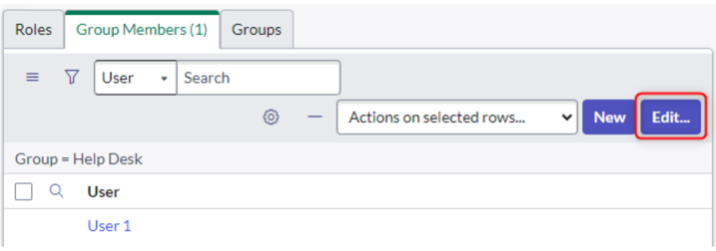
3. Click **Edit** to change the roles.



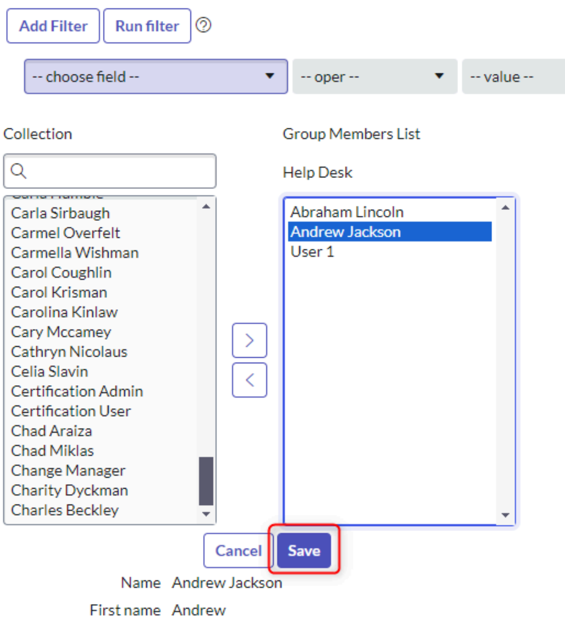
4. Add the `x_caci_crm_wxcc.CC Agent` role and click **Save**.



5. Click the **Group Members** tab and then **Edit** to add your users.

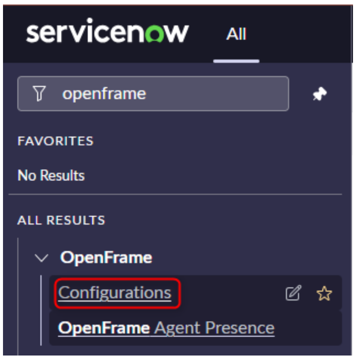


6. Add the users to the list and click **Save** when finished.

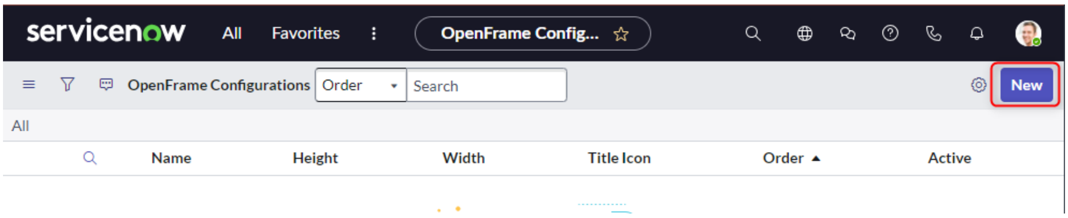


Create the Openframe Configuration

1. Go to **All > Openframe > Configurations**.

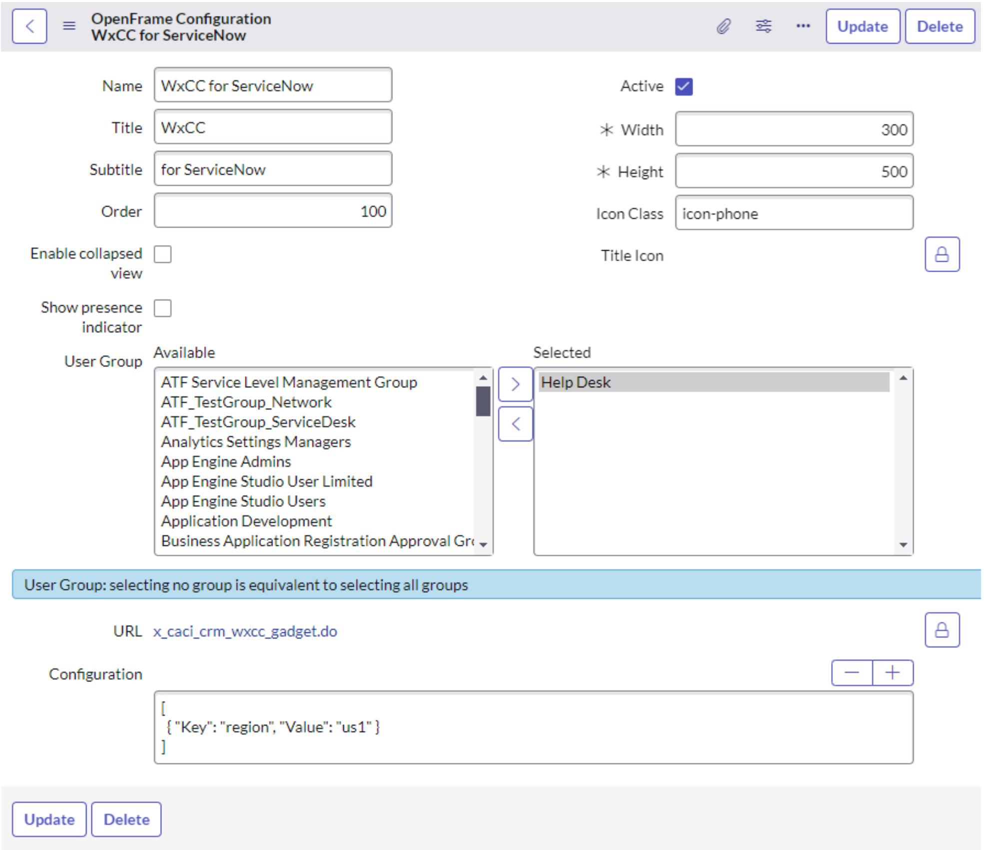


2. Click **New**.



3. Enter the following minimum values:
    a. Name: WxCC for ServiceNow
    b. Title: Wxcc
    c. Subtitle:for ServiceNow
    d. Active: true
    e. Width: 300
    f. Height: 500
    g. Icon Class: icon-phone
    h. User Group (phone icon will only show for these users): [select the User Group with CC Agent role]
    i. URL: x_caci_crm_wxcc_gadget.do
    j. Configuration (see Customization tab for more):

```
[
{ "Key": "region", "Value": "us1" },
]
```

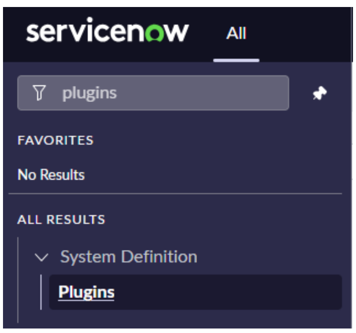


Install ServiceNow for Enterprise licensed instances

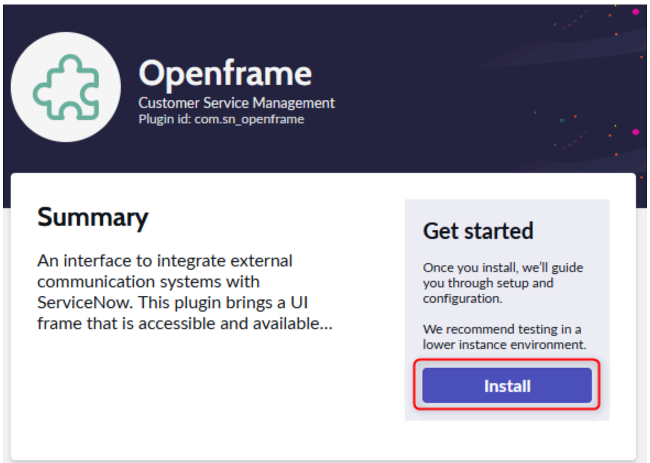
The following sections describe the steps to install the ServiceNow connector for production instances.

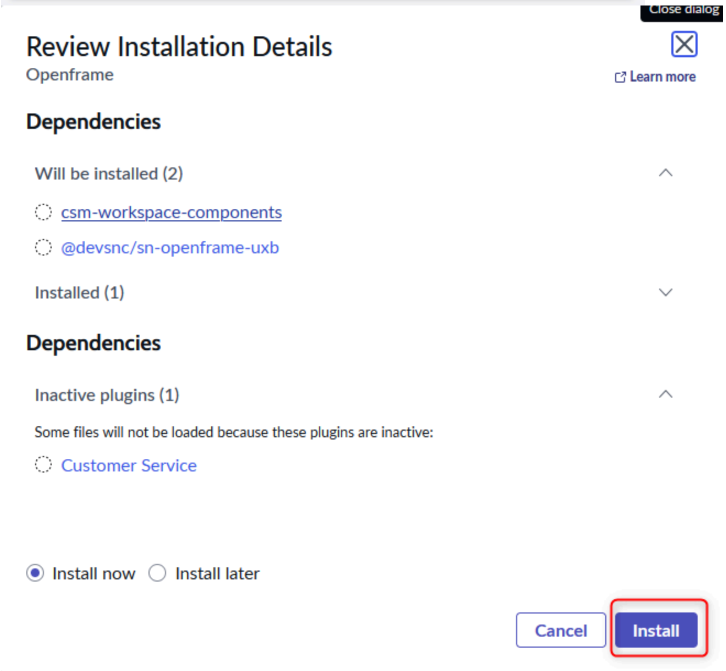
Install the ServiceNow Openframe plugin

1. Sign into your ServiceNow instance as a System Administrator.
2. Go to **All > System Definition > Plugins**.



3. Search for Openframe and install the plugin.

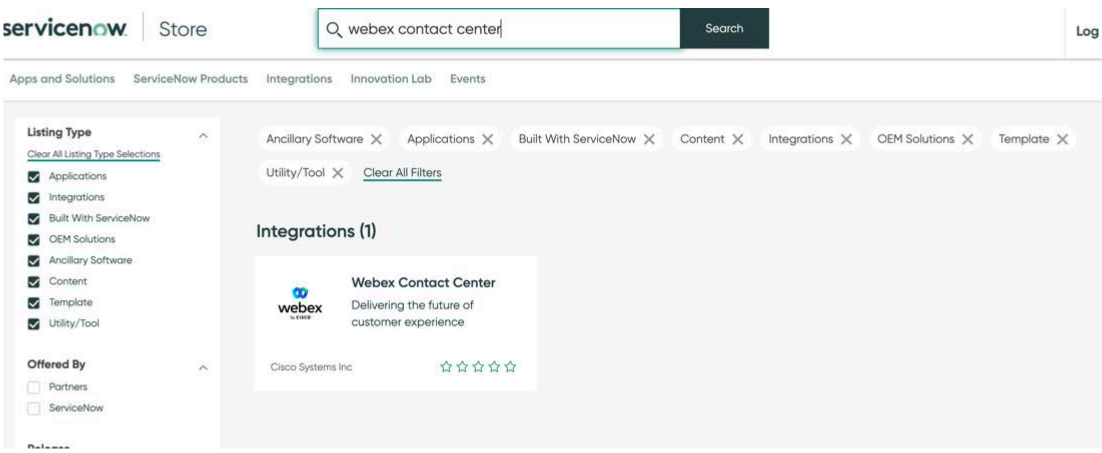




Install the Webex Contact Center application

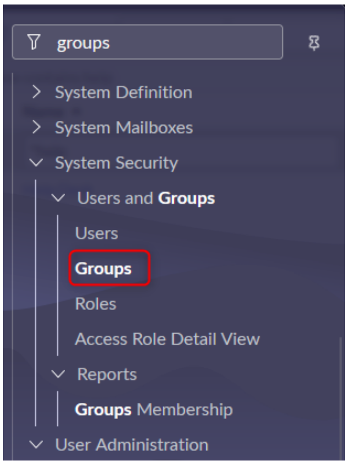
Instances that have enterprise licenses can install the Webex Contact Center application directly from the ServiceNow Store.

Download and install the Webex Contact Center package from the ServiceNow store: https://store.servicenow.com/

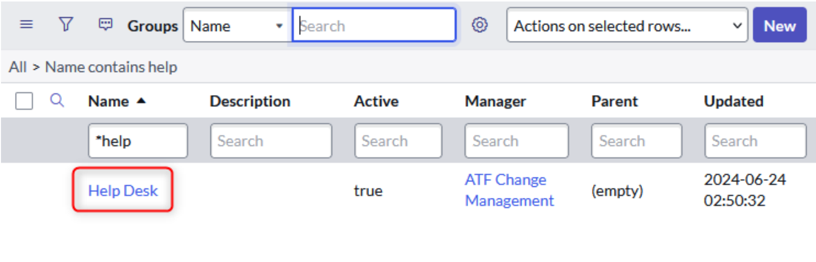


Assign Contact Center Agent Role

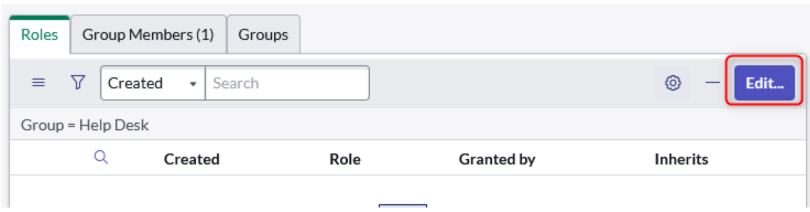
1. Go to **All > System Security > Groups**.



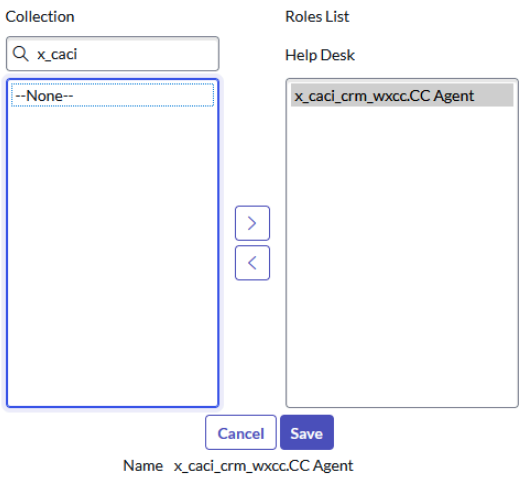
2. Search for the Group you want to edit and click the name.



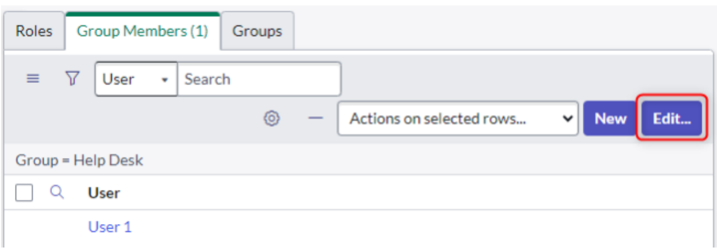
3. Click **Edit** to change the roles.



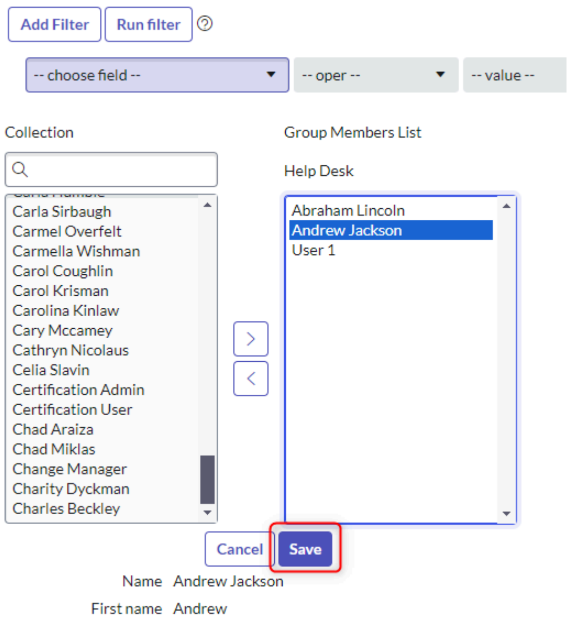
4. Add the `x_caci_crm_wxcc.CC Agent` role and click **Save**.



5. Click the **Group Members** tab and then **Edit** to add your users.

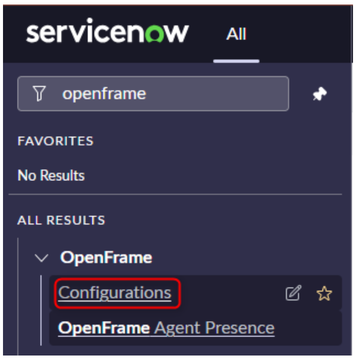


⑥ Add the users to the list and click **Save** when finished.

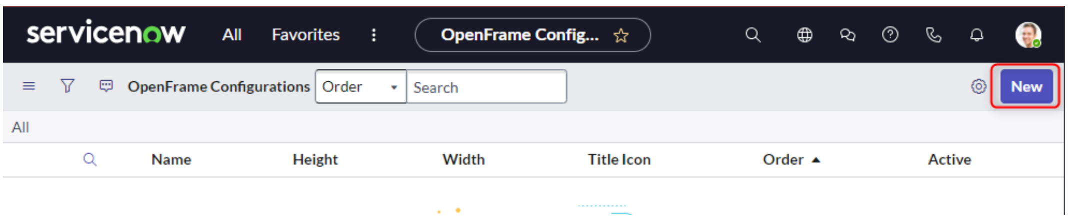


Create the Openframe Configuration

① Go to **All > Openframe > Configurations**.



② Click **New**.



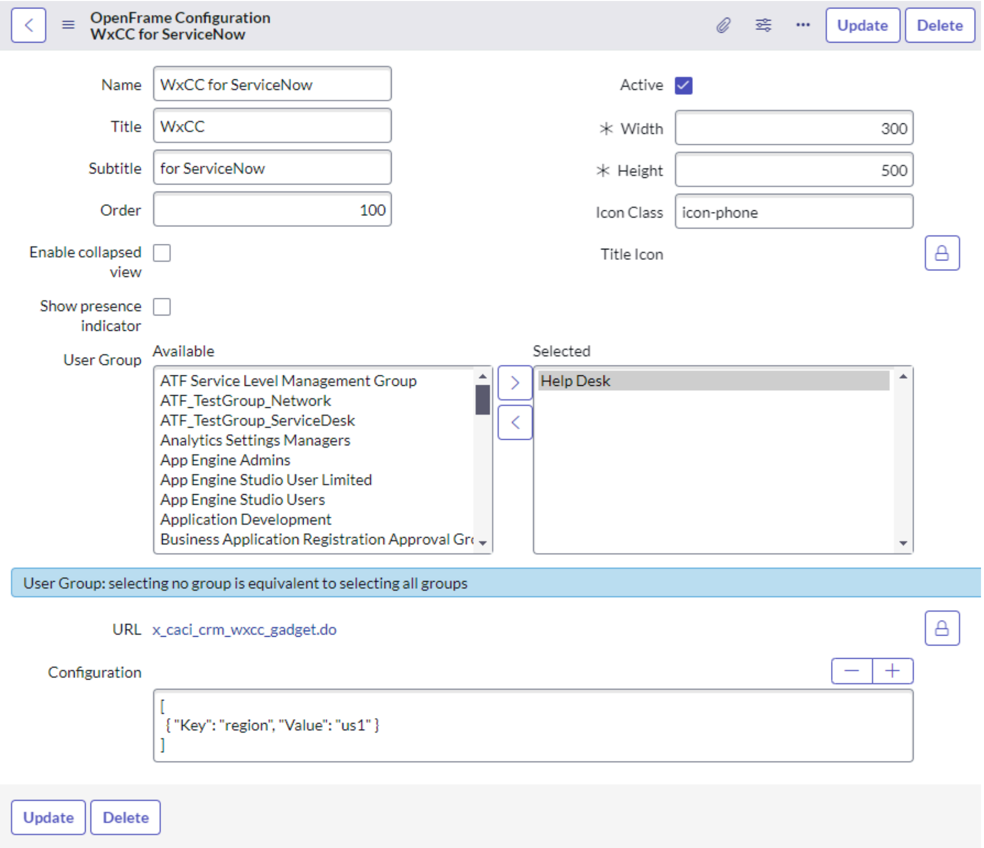
3. Enter the following minimum values:

   a. Name: WxCC for ServiceNow
   b. Title: Wxcc
   c. Subtitle:for ServiceNow
   d. Active: true
   e. Width: 300
   f. Height: 500
   g. Icon Class: icon-phone
   h. User Group (phone icon will only show for these users): [select the User Group with CC Agent role]
   i. URL: x_caci_crm_wxcc_gadget.do
   j. Configuration (see Customization tab for more):

      [

      { "Key": "region", "Value": "us1" },

      ]



Customize

The following section explains how to configure and customize the Webex Contact Center ServiceNow Agent Desktop application. You can tailor and automate various workflows to assist agents in managing inbound and outbound calls within the Webex Contact Center Agent Desktop.

Openframe Configuration property customizations

The table below details how to customize the properties of the custom desktop layout file. Tailor the behavior of ServiceNow to fit your specific business needs.

Openframe Configuration key property	Description	Values
region	Wxcc Region used by agent	• North America: us1 • Canada: ca1 • UK: eu1 • EU: eu2 • APJC: anz1 • Japan: jp1 • Singapore: sg1

Openframe Configuration key property	Description	Values
shareRecordVariable	CAD variable to save the Sys_Id of the Phone Log and is used to change the ownership of the record for transferred calls.	[Default:sharedRecordId] Any CAD variable
enableNotifications	Enable browser-based pop-up notifications.	[Default:false] true or false
screenPopOnNoMatch	Auto-click "New record link" when no match for new customer or new case when not found (depending on screenPopIncomingMode)	[Default:false] true or false
screenPopIncomingMode	What record type to search on incoming call. Aligns with customerTable or caseTable.	[Default:Customer] Customer or Case
customerTable	The table to search for customers and to create new customer records with “New Record link”. User (ITSM) = sys_user Contact (CSM) = customer_contact	[Default:Users] Users or contact
caseTable	The table to search for cases and to create new case records with "New record link". Incident (ITSM) = incident Case (CSM) = sn_customerservice_case	[Default:Incidents] Cases or Incidents
lookupFields	Comma separated field(s) to query on Table. Example:phone number	[Default:phone,mobile_phone] Any field on table defined in customerTable or caseTable
lookupVariable	Value to query tables for inbound call. Example: CADIncidentNumCollected	[Default:ANI] ANI or any CAD variable
lookupResultFields	Labels to display at top of connector for lookup results on active phone call. Example: name, location	[Default:name,title,department] Up to any three fields on table defined in customerTable or caseTable.
countryCodeRemoval	Comma separated prefixes to be removed from ANI or CAD variable before performing lookup. Example: +1,+49,+41	[Default:] Any country code
customerRecordMapping	Mapping to create new customer record with "New record link" and populate CAD Variable data. Example: caller_id={ani};employee_number={CADVariable3}	
caseRecordMapping	Mapping to create new case record with "New record link" and populate data. Example: caller_id={ani};u_cisco_queue={QueueName}	
activityRecordMapping	Mapping for Phone Log data population. Example: caller_id={ani};u_call_disposition={CADCallResult}	
omniReasonCrm[A(10]	"Unavailable" AWA ServiceNow Presence State on CRM channel when receiving voice call. To get this value, go to Advanced Work Assignment > Settings > Presence States. Right click the desired Presence State and click “Copy sys_id”. Example: 7f888794dbd28e10999d8c3b1396198b	Any AWA Presence State Sys_Id
omniReasonVoice	ID of the WxCC “Idle” Auxiliary code used when the agent receives inbound chat. Example: cff0ca82-c623-4cde-aaf1-4e17f268f7f7	Any WxCC Idle Auxiliary Code
noteField	Field name for the Phone Log notes created by the agent. If the config value is empty, the note feature is disabled and doesn't appear on the "LOG" tab in connector. Example: u_comment	Any field on Phone Log table

Example Configuration

Here is a config sample that allows:

- Doing a lookup on the Incidents table (based on incident number collected on the IVR)
- Record Creation on No Match
- State change for OmniChannel
- Saving notes on a custom field on the Phone Log table

[

{ "Key": "region", "Value": "eu2" },

{ "Key": "screenPopIncomingMode", "Value": "Case" },

{ "Key": "customerTable", "Value": "Users" },

{ "Key": "customerRecordMapping", "Value": "phone={ani};mobile_phone={ani}" },

{ "Key": "caseTable", "Value": " Incidents" },

{ "Key": "caseRecordMapping", "Value": "product=8583ce8237732000158bbfc8bcbe5dd9;short_description={ani}" },

{ "Key": "lookupFields", "Value": " numbephoner"},

{ "Key": "lookupVariable", "Value": "IVR_Incident_Number" },

{ "Key": "lookupResultFields", "Value": "short_description,caller_id,priority" },

{ "Key":"enableNotifications", "Value": "true" },

{ "Key": "omniReasonCrm", "Value": "7f888794dbd28e10999d8c3b1396198b"},

{ "Key": "omniReasonVoice", "Value": "868643ae-c1ed-4849-a5be-a3deaa54f97b"},

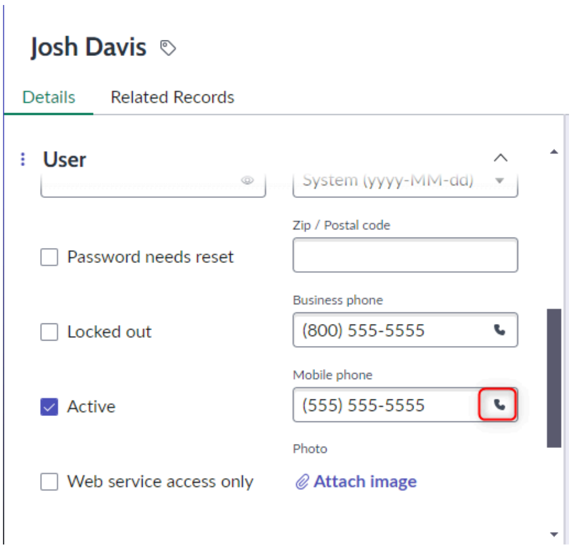
{ "Key": "screenPopOnNoMatch", "Value": "true" },

{ "Key": "noteField", "Value": "u_wxcc_notes" }

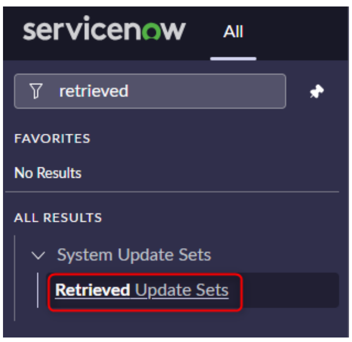
]

Click-to-dial UI Macro (Classic UI)

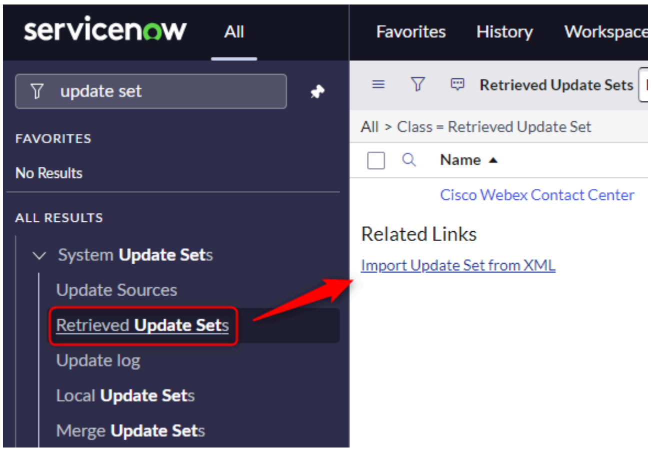
When using ServiceNow's Configurable Workspaces, click to dial on phone records will automatically be enabled. When using the Classic UI view, an update set must be imported to get the same functionality on phone records. Download the Click to dial Update Set and follow these steps to add the click-to-dial functionality to Classic UI.



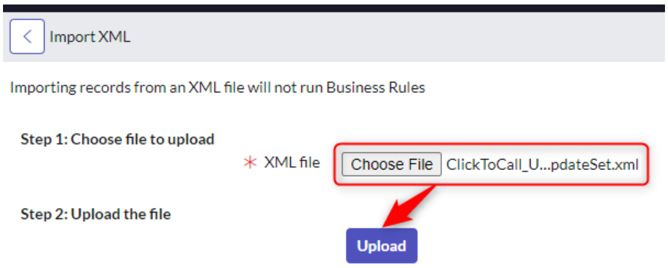
① Go to **All > System Update Sets > Retrieved Update Sets**.



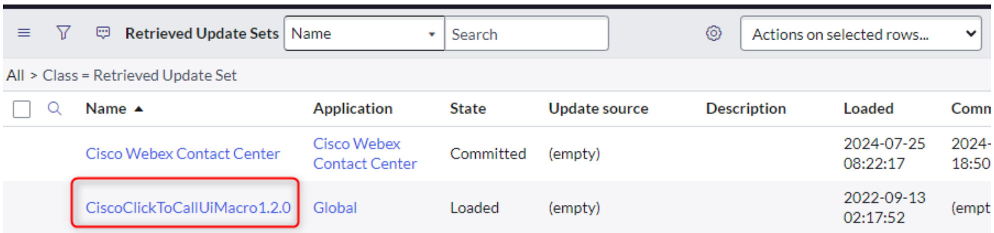
2. Click **Import Update Set from XML**



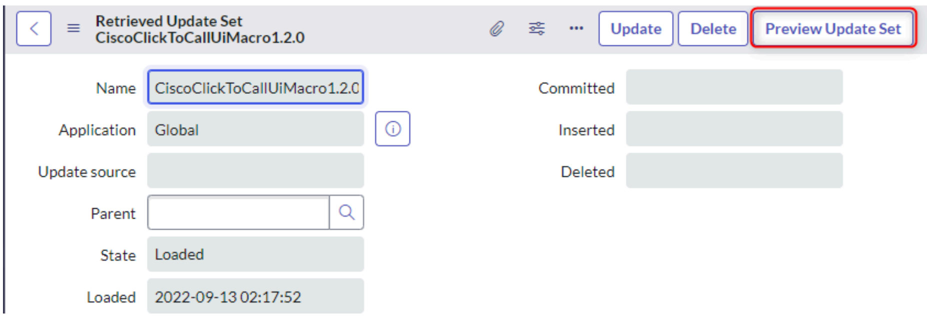
3. Click **Choose File**, select the downloaded **Click-to-dial UI** macro .xml file and click **Upload**.



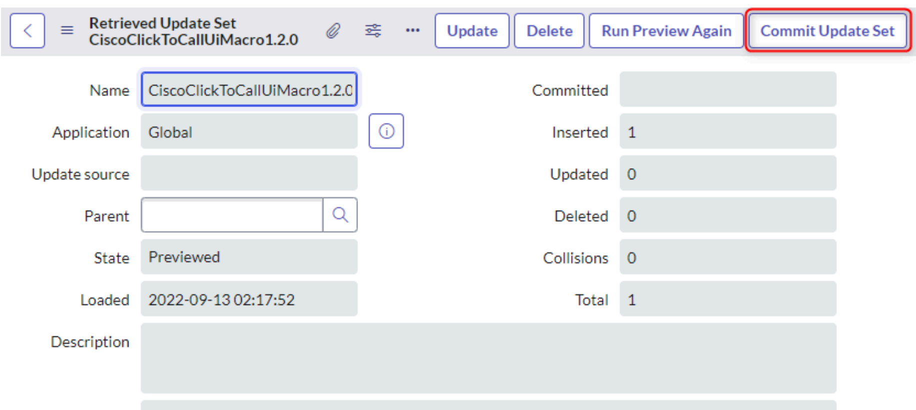
4. Click on the name once uploaded to open the **Update Set**.



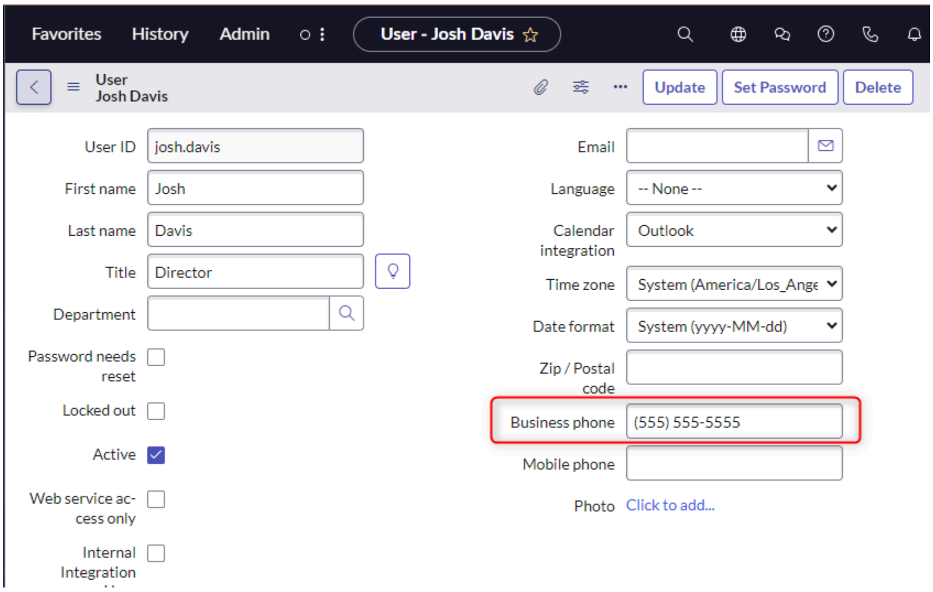
5. Click **Preview Update Set** and **Close** once finished.



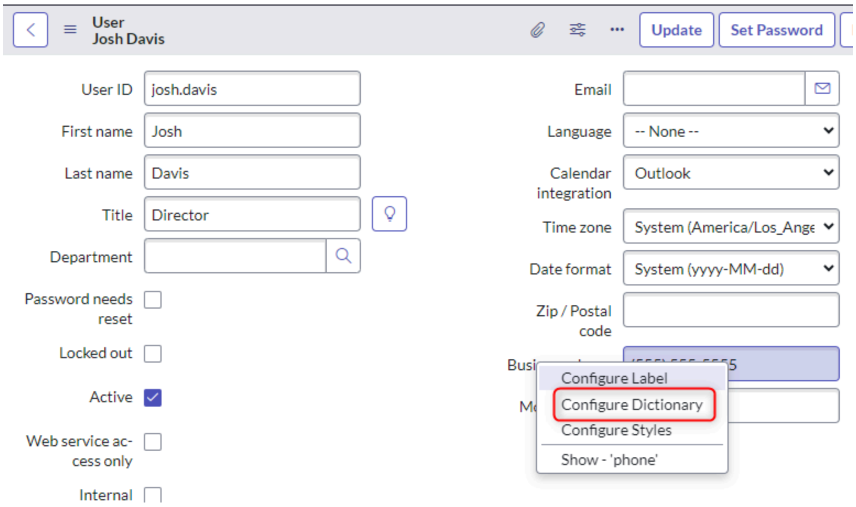
6. Click **Commit Update Set** and **Close** once finished.



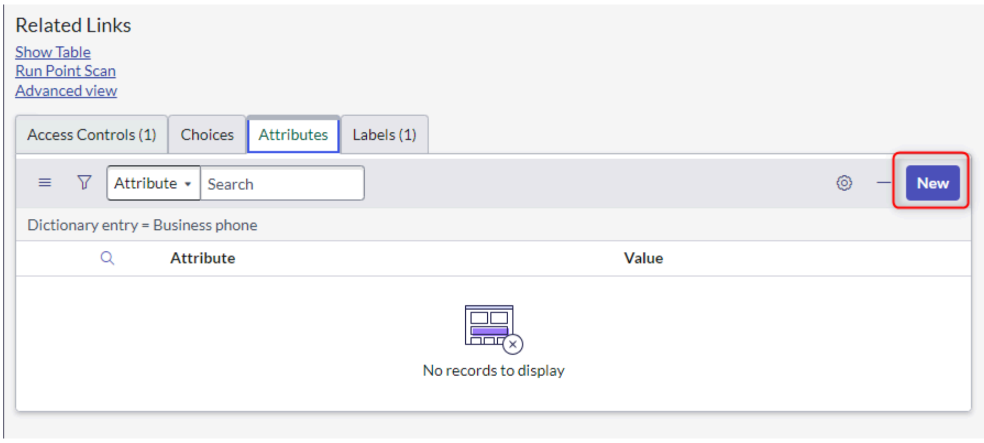
7 Open an existing record to configure click-to-dial.



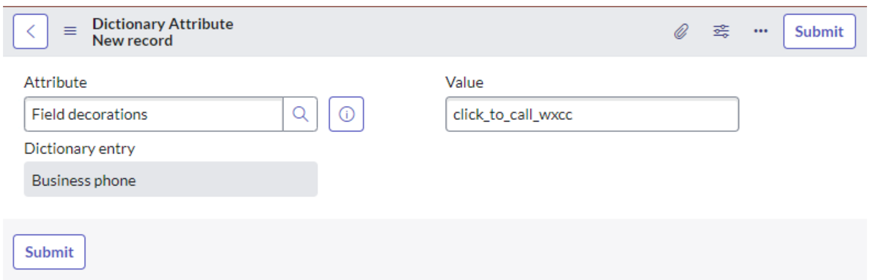
8 Right-click on the phone record name and click **Configure Dictionary**.



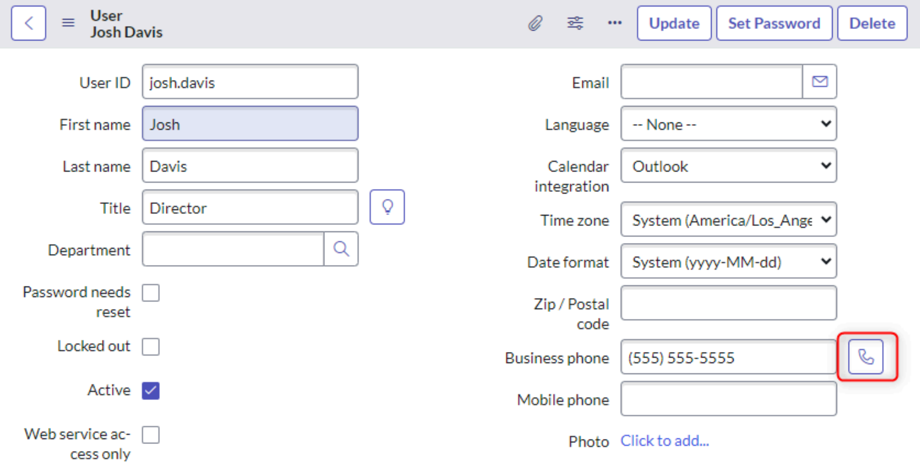
9 Click **New** on the **Attribute** tab under **Related Links**.



10 Select **Field Decorations** as the attribute, type `wxcc_click_to_call_wxcc` as the value and click **Submit**.



⑪ The **Click-to-dial** button should now be visible on the record page.

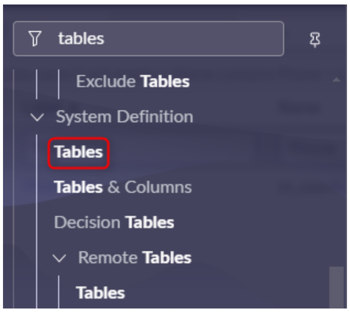


⑫ Repeat for any other phone fields.

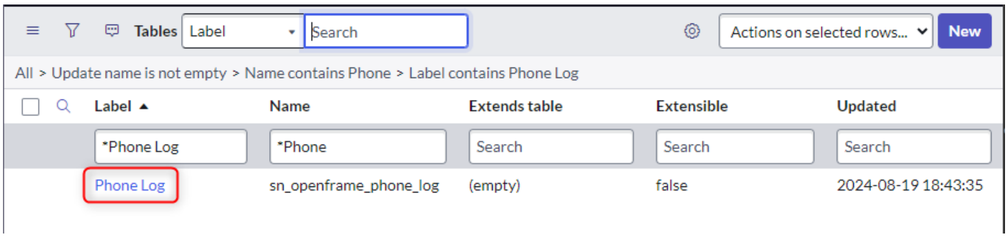
Adding Notes to Phone Logs

Follow these steps to create a custom notes field on the Phone Log record. This will allow agents to write and save information about the call.

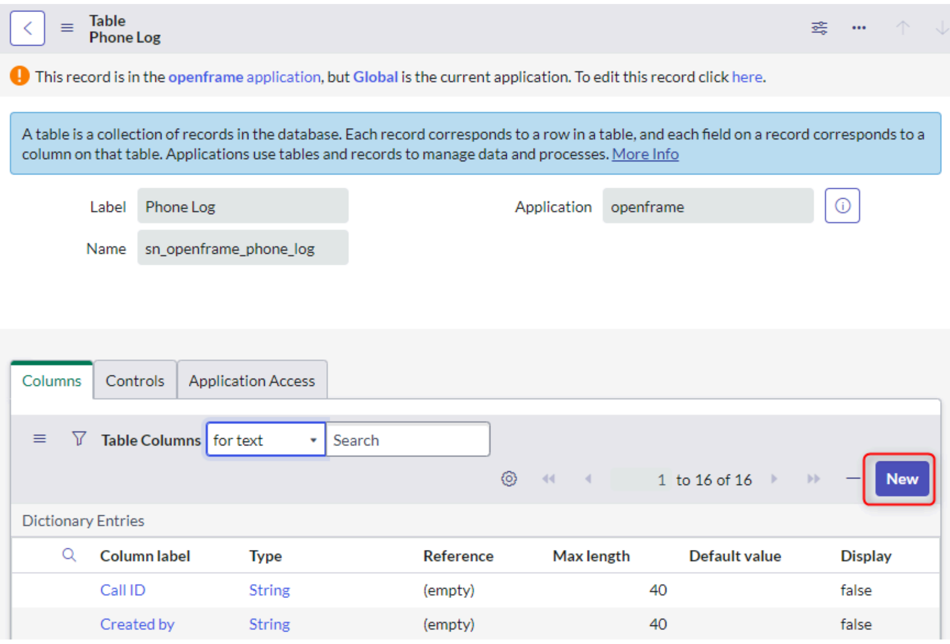
① Go to **All > System Definition > Tables**.



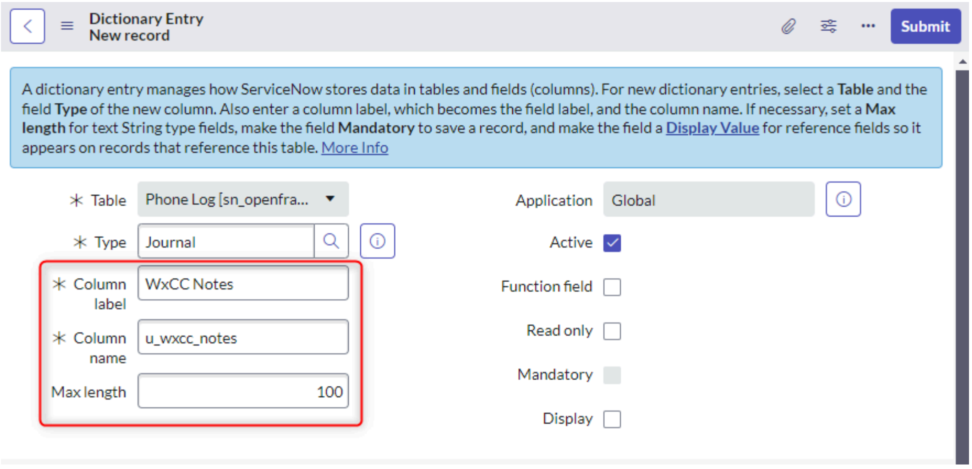
② Search and open the Phone Log table.



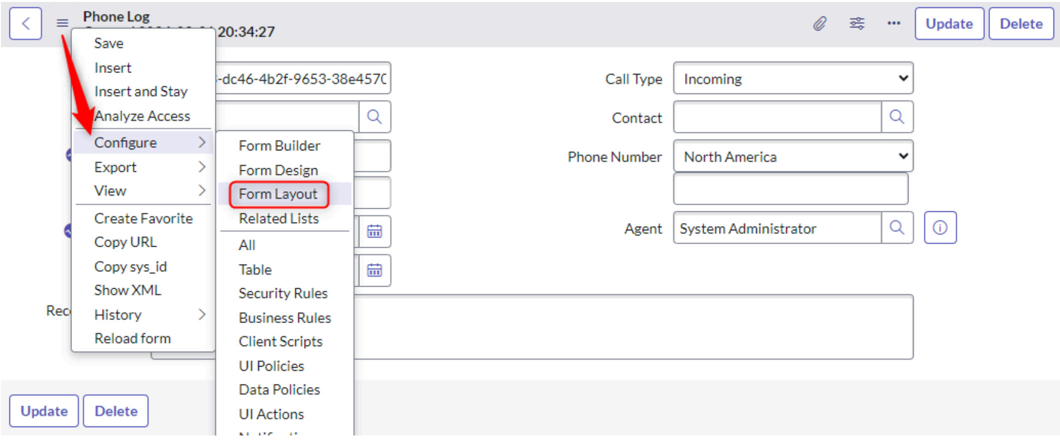
③ From the **Columns** tab, click **New**.



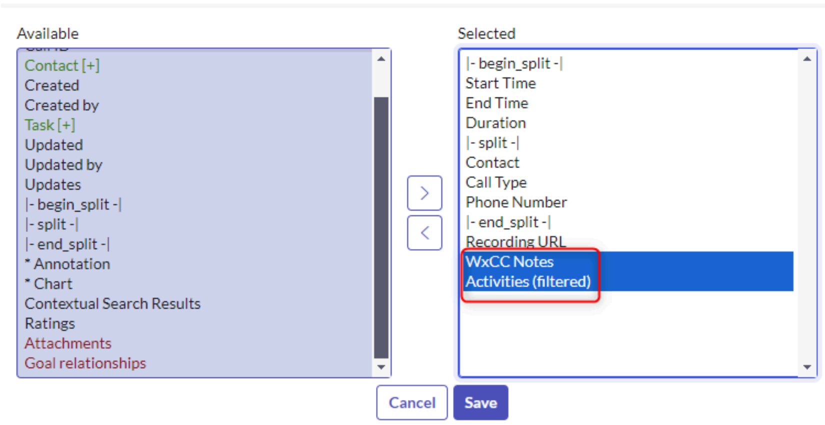
4. Choose `Journal Input` as field type. Type in a Column Label, Max length and click **Submit**.



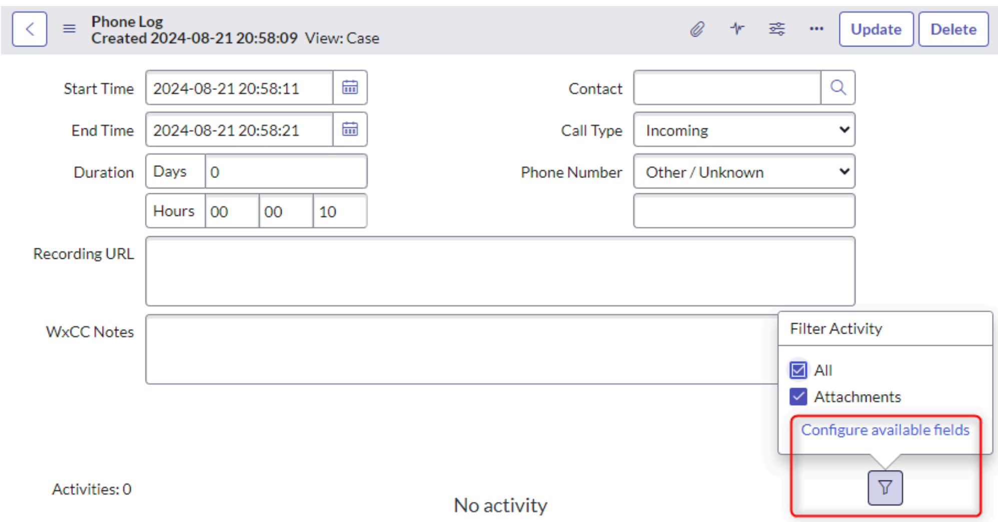
5. Open a phone log record and go to **Configure > Form Layout**.



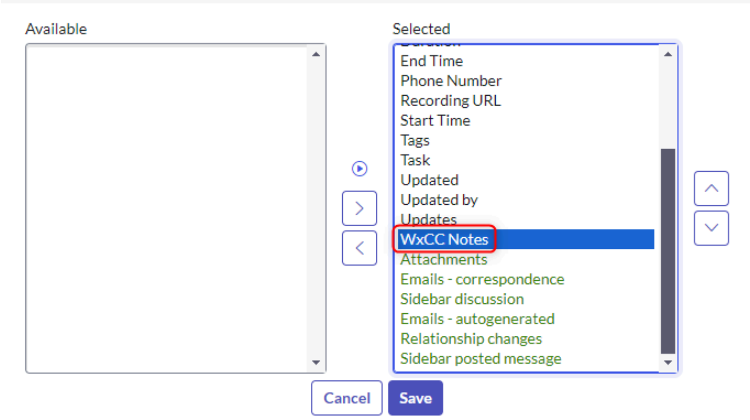
6. Add the new field, activities (filtered) and click **Save**.



7. Click the **Activity** filter and configure available fields.



8. Add the newly created note field and click **Save**.



9. In the Openframe Configuration, add the key:

   a. { "Key": "noteField", "Value": " u_wxcc_notes" }

Was this article helpful?

Yes, thank you!

Not really