Migrate Legacy Salesforce Webex Contact Center Connector to New Version

Contents

Overview

This guide will describe the steps required to migrate from the legacy Webex Contact Center connector for Salesforce to the new connector. Only follow these steps if the legacy connector is installed and configured in your instance. For new installations, follow the Admin guide.

The new Salesforce connector can be installed and configured in parallel with the legacy connector. Access to the connectors will be controlled through Call Centers minimizing downtime.

Migration Steps

To migrate to the new Salesforce connector, complete the following tasks:

Install the new Webex Contact Center for Salesforce connector (Task)

Follow the instructions in the Admin guide to install the new connector.

1. Install new connector from AppExchange Marketplace.

2. Import the new Call Center file.

Softphone Layout (Reference)

No changes are required for the Softphone Layout used. Only change the Softphone Layout if a new use case is desired.

Assign new User Permission Set (Task)

The new connector sets access based on Permission Sets unlike the legacy connector. Users must be added to the new Permission Set to use the connector. More details are available in the Admin guide.

1. Go to Setup > Users > Permission Sets.

2. Manage the **Webex Contact Center Agent** permission set assignment to add the Users.

Configure new Call Center settings (Task)

The Call Center contains the connectors main configuration. See the *Call Center Configuration Comparison* below for migration field references.

1. Go to Setup > Call Center > Call Centers.

2. If you want to reference the old Call Center field, right-click the **Webex Contact Center Agent Desk-top 2.0(July 2023)** name and choose Open in new tab.

3. Click Edit for the new **WxCC Call Center** name.

4. Set configuration based on business use case.

5. Click Save when finished.

Change Call Center assigned to Users (Task)

When ready to switch Users to the new connector, you will need to manage the Call Center they are assigned to. There are two ways to change the Call Center assignment.

From Call Centers:

1. Go to Setup > Call Center > Call Centers.

2. Click the **Webex Contact Center Agent Desk-top 2.0(July 2023)** name.

3. Click Manage Call Center Users.

4. Check the names of the Users and Remove Users to remove them from the old Call Center.

5. From the Call Centers list, Click the new **WxCC Call Center** name.

6. Click Manage Call Center Users.

7. Click Add More Users, find/check the users you want to add and click Add to Call Center.

8. Have the user refresh their browser to load the new configuration.

From Users:

1. Go to Setup > Users > Users

2. Click Edit on the desired User record.

3. Edit the General Information > Call Center field to the new **WxCC Call Center name**.

4. Click Save.

5. Have the user refresh their browser to load the new configuration.

Roll Back Procedure (Task)

To roll back to the legacy connector, follow the same steps in Change Call Center assigned to Users and set the User back to the **Webex Contact Center Agent Desk-top 2.0(July 2023)** Call Center.

Call Center Configuration Comparison (Reference)

The following section describes the difference of each property of the Call Center configuration between the legacy and new versions.

Legacy Call Center		How to migrate	New Call Center		
Key	**Value / Example**		**Key**		**Value / Example**
			WxCC Settings		
		new: WxCC Region used by agent	WxCC Region		eu2

Legacy Call Center		How to migrate	New Call Center	
Key	**Value / Example**	**How to migrate**	**Key**	**Value / Example**
Cisco Webex Contact Center Desktop Information			**General Information**	
InternalName	WebexCCAgentDesktopV20230720	use unique name	Internal Name	wxCcCallCenter
Display Name	Webex Contact Center Agent Desktop 2.0(July 2023)		Display Name	WxCC Call Center
			Description	Webex Contact Center Salesforce Integration
CTI Adapter URL	https://desktop.wxcc-us1.cisco.com/	do not change	CTI Adapter URL	https://wxcc-crm-connectors.ciscocservice.com/salesforce/connector/v1/index.html
Use CTI API	TRUE	do not change	Use CTI API	TRUE
Softphone Height	550		Softphone Height	550
Softphone Width	500		Softphone Width	400
Salesforce Compatibility Mode	Lightning	do not change	Salesforce Compatibility Mode	Lightning
Advanced Screenpop			**Advanced Screen Pop Search Configuration**	

Migrate Legacy Salesforce Webex Contact Center Connector to New Version

Call Center Configuration Comparison (Reference)

Legacy Call Center		How to migrate	New Call Center	
Key	**Value / Example**	**How to migrate**	**Key**	**Value / Example**
Advanced Screen-pop Enabled	TRUE	copy value to new Call Center ->	Advanced Screen Pop Enabled	TRUE
CAD Variable Name	Sendungsnummer	copy value to new Call Center ->	CAD Variable Name	SearchAndScreen-Pop
Remove ANI Prefix Strings		copy value to new Call Center ->	Remove ANI Prefix Strings	
Screenpop Settings For No RecordMatch			**Screen Pop Settings For No Record Match**	
Enable Screenpop For No Matching Records	TRUE	n/a => configure in Sophtphone Lyout In the Softphone Layout, you can choose to create a new record for No matching record calls (Pop to new <Object type>).		
Salesforce object name	Case	n/a => configure in Sophtphone Lyout		
Object Field Mappings	[{"wxccField-Name":"Language","sfdcFieldName":"Language__c","isDefaultValueEnabled":"false","isConditionalEnabled":"false"}]	changed format of configuration: a string of comma separated key value pairs to map the WebexCC CAD variables and SFDC Field Names.	Object Field Mappings	Language__c={Language}
	isDefaultValueEnabled	n/a		

Migrate Legacy Salesforce Webex Contact Center Connector to New Version

Call Center Configuration Comparison (Reference)

Legacy Call Center		How to migrate	New Call Center	
Key	**Value / Example**		**Key**	**Value / Example**
	isConditionalEnabled	n/a		
Object Conditional Mappings	[]	n/a		
Call Activity Record Creation			**Call Activity Record Creation**	
Salesforce Package Namespace	ciscocjs	n/a		
Auto Refresh Enabled	TRUE	n/a		
Create Activity Record at Connected State	TRUE	n/a - Activity record is always created at connected state		
Open Activity Record On Connected State	FALSE	n/a		
Open Activity Record On Wrap-Up State	FALSE	n/a		
Activity record ownership to be changed for transferred calls	TRUE	copy value to new Call Center ->	Change Activity Record Ownership For Transferred Calls	FALSE
Name of the cad variable that holds activity id	ActivityId	copy value to new Call Center ->	CAD Variable Name That Holds Activity Id	ActivityId
Record Call Live Notes	TRUE	copy value to new Call Center ->	Record Call Live Notes	TRUE

Call Center Configuration Comparison (Reference)

Legacy Call Center		How to migrate	New Call Center	
Key	**Value / Example**	**How to migrate**	**Key**	**Value / Example**
Live Call Notes Field Mapping	Description	copy value to new Call Center ->	Live Call Notes Field Mapping	Description
Date Format In Subject	MM-dd-yyyy hh:mm a	copy value to new Call Center ->	Date Format In Subject	MM-DD-YYYY hh:mm a
Subject Template	{direction} Call {activityDatetime}	copy value to new Call Center ->	Subject Template	{direction} Call {activityDatetime}
Custom Field Update Enabled	TRUE	n/a		
Object Field Mapping	[{"CadFieldName":"Language","SalesforceFieldName":"Language__c","isDefaultValueEnabled":false,"defaultFieldValue":""},{"CadFieldName":"Category","SalesforceFieldName":"Category__c","isDefaultValueEnabled":true,"defaultFieldValue":"not for WxCC calls"}]	changed format of configuration: a string of comma separated key value pairs to map the WebexCC CAD variables and SFDC Field Names.	Object Field Mappings	Category__c={Category},Product__c={Product},Language__c={Language}
	isDefaultValueEnabled	n/a		
	defaultFieldValue	n/a		

Legacy Call Center		How to migrate	New Call Center	
Key	**Value / Example**		**Key**	**Value / Example**
Case Management			**Case Management**	
Auto Case Creation For Inbound Calls	FALSE	copy value to new Call Center ->	Auto Case Creation For Inbound Calls	FALSE
Auto Case Creation For Outbound calls	FALSE	copy value to new Call Center ->	Auto Case Creation For Outbound calls	FALSE
Open Case Object In Edit Mode	FALSE	copy value to new Call Center ->	Open Case Object In Edit Mode	FALSE
Field Mappings	[{"wxccField-Name":"Ac-countId","sfdcField-Name":"Ac-countId","isDefault-ValueEna-bled":"false","is-ConditionalEna-bled":"false"},{"wxccFieldName":"Con-tactId","sfdcField-Name":"Con-tactId","isDefault-ValueEna-bled":"false","is-ConditionalEna-bled":"false"}]	n/a		

Call Center Configuration Comparison (Reference)

Legacy Call Center		How to migrate	New Call Center	
Key	**Value / Example**	**How to migrate**	**Key**	**Value / Example**
Object Field Mappings	[{"CadFieldName":"Language","SalesforceFieldName":"Language__c","isDefaultValueEnabled":false,"defaultFieldValue":""},{"CadFieldName":"Category","SalesforceFieldName":"Category__c","isDefaultValueEnabled":true,"defaultFieldValue":"not for WxCC calls"}]	changed format of configuration: a string of comma separated key value pairs to map the WebexCC CAD variables and SFDC Field Names.	Object Field Mappings	Category__c={Category},Product__c={Product},Language__c={Language}
	isDefaultValueEnabled	n/a		
	defaultFieldValue	n/a		
Object Conditional Mappings	[]	n/a		
Outdial Configuration			**Outdial Configuration**	
Remove Phone Number Prefix Strings		copy value to new Call Center ->	Remove Phone Number Prefix Strings	
Set Out Dial ANI	TRUE	n/a		

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Call Center Configuration Comparison (Reference)

Legacy Call Center		How to migrate	New Call Center	
Key	**Value / Example**	**How to migrate**	**Key**	**Value / Example**
Omnichannel State Sync Configuration			**Omni-Channel State Sync Configuration**	
Omnichannel state sync enabled	TRUE	copy value to new Call Center ->	Enable Omni-Channel Sync	FALSE
Default idle code when on voice call	On Call	copy value to new Call Center ->	Omni-Channel Not Ready Reason	On Call
Default idle code when on CRM omni channel	Chat	copy value to new Call Center ->	WxCC Idle Reason Code	Chat
			Widget Settings	
		new	Send Browser Notifications	FALSE