

Authorize a New Webex Integration



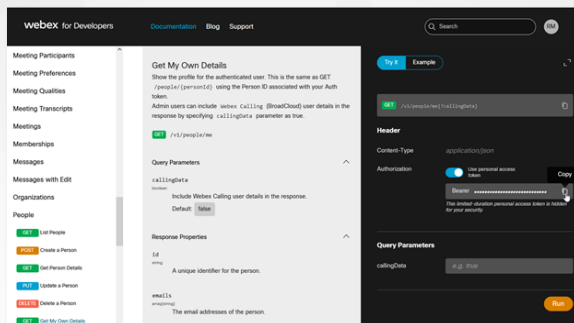
Before you can use any Webex features in Salesforce, you'll need to begin by authorizing a Webex integration in the Webex Admin tab. For this how to, you'll be using a personal access token that you retrieve from the Webex Developer Portal.




TIP: If you've already completed this step in another how to, you don't need to repeat it here.

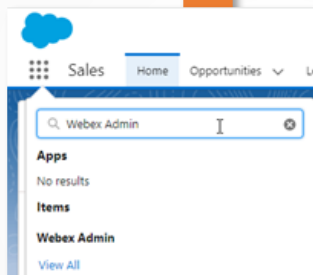
To authorize a Webex Integration...

- 1 Login to [Webex for Developers](#) and use the left navigation panel to navigate to **Documentation > APIs > Full API Reference > People > Get My Own Details**.

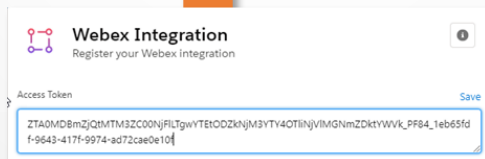


Make sure the **Use personal access token** toggle button is enabled (toggled to blue) and click the  icon in the token field.

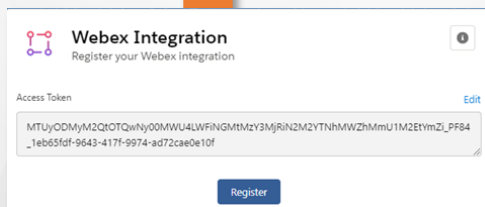
- 3 In another browser tab or window, navigate to the **Webex Admin** tab in Salesforce Cloud.



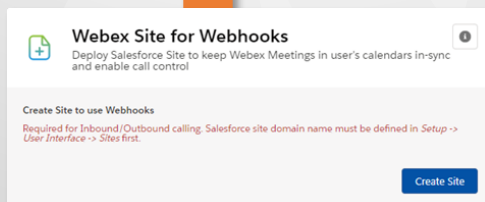
- 4 Paste the access token in the **Access Token** field within the **Webex Integration** widget on the Webex Admin page. Click **Save**.



- 5 Click **Register** to save the access token. A success message appears at the top of the page.



- 6 On the same Webex Admin page, scroll to the **Webex Site for Webhooks** widget, and then click **Create Site**. A request is being processed message should display, followed by a successfully created message.



You can now access Webex features in Salesforce.



TIP: The access token will be automatically refreshed as necessary.

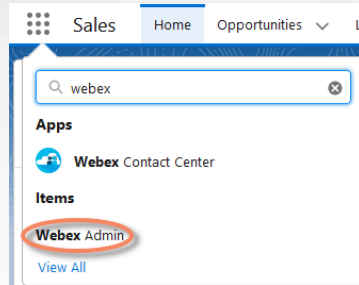
Enable the Webex Meetings Calendar Service and Webex Meetings



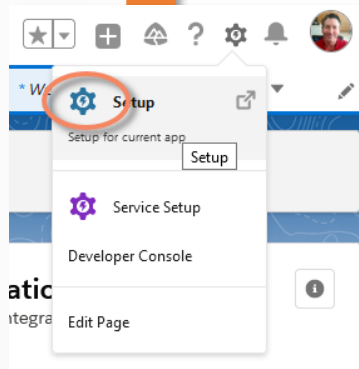
You'll want to enable the Webex Meetings Calendar Service to access Webex calendar features from within Salesforce as well as Webex Meetings. Enabling the service will enable you to see upcoming Webex meetings in the Webex Homepod as well as meeting information for Opportunities, Contacts and other Salesforce objects, while the Webex Meetings component enables you to access Webex messaging functionality right from within Salesforce...

To enable the Webex Meetings Calendar Service and Webex Meetings...

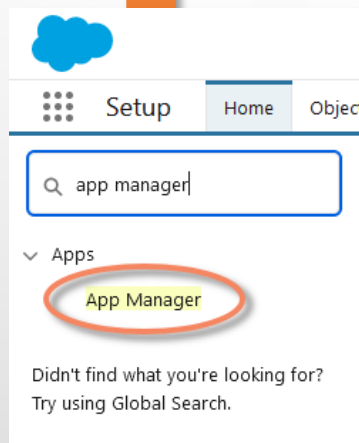
- 1 Search for **Webex Admin** in the **Apps** search box and then click the **Webex Admin** search result:



- 2 In the **Webex Admin** tab, click **Setup**




- 3 Search for **App Manager** in the Setup search box and click the **App Manager** search result:



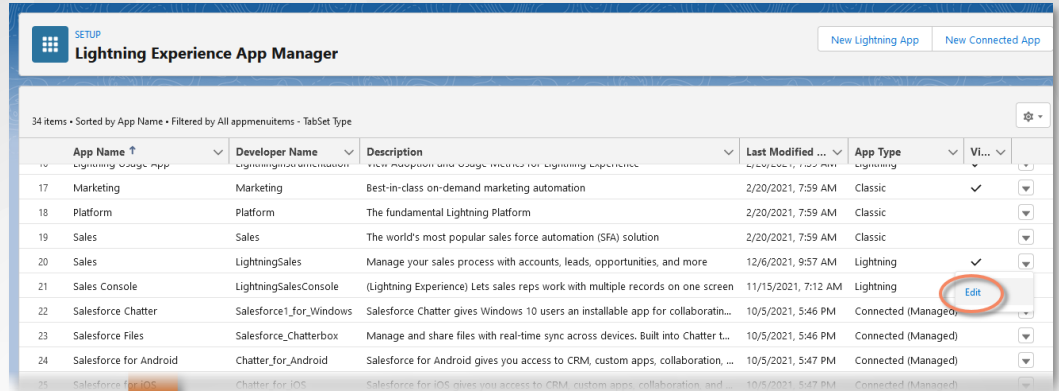
Enable the Webex Meetings Calendar Service and Webex Meetings (Continued)

To enable the Webex Meetings Calendar Service and Webex Meetings (continued)...

- 4 In the **Lightning Experience Manager** choose an app and click the  button and then select **Edit**:

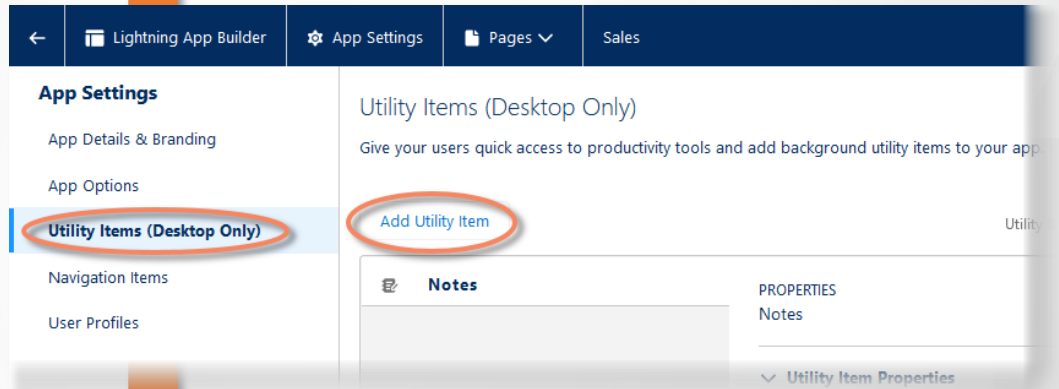


NOTE: You can only enable the Calendar Service for **Lightning App Types**



App Name	Developer Name	Description	Last Modified	App Type	Visibility	Action
Lightning Stage App	LightningStageAutomation	View desktop and stage metrics for Lightning Experience	2/20/2021, 7:59 AM	Lightning	✓	
Marketing	Marketing	Best-in-class on-demand marketing automation	2/20/2021, 7:59 AM	Classic	✓	
Platform	Platform	The fundamental Lightning Platform	2/20/2021, 7:59 AM	Classic	✓	
Sales	Sales	The world's most popular sales force automation (SFA) solution	2/20/2021, 7:59 AM	Classic	✓	
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	12/6/2021, 9:57 AM	Lightning	✓	Edit
Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	11/15/2021, 7:12 AM	Lightning	✓	
Salesforce Chatter	Salesforce1_for_Windows	Salesforce Chatter gives Windows 10 users an installable app for collaborat...	10/5/2021, 5:46 PM	Connected (Managed)	✓	
Salesforce Files	Salesforce_Chatterbox	Manage and share files with real-time sync across devices. Built into Chatter t...	10/5/2021, 5:46 PM	Connected (Managed)	✓	
Salesforce for Android	Chatter_for_Android	Salesforce for Android gives you access to CRM, custom apps, collaboration, ...	10/5/2021, 5:47 PM	Connected (Managed)	✓	
Salesforce for iOS	Chatter_for_iOS	Salesforce for iOS gives you access to CRM, custom apps, collaboration, and ...	10/5/2021, 5:47 PM	Connected (Managed)	✓	

- 5 In the Lightning App Builder select **Utility Items (Desktop Only)** and then click **Add Utility Item**:



App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)**
- Navigation Items
- User Profiles

Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app

Add Utility Item

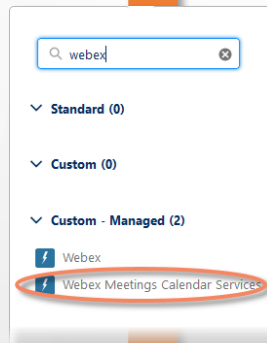
Notes

PROPERTIES

Notes

▼ **Utility Item Properties**

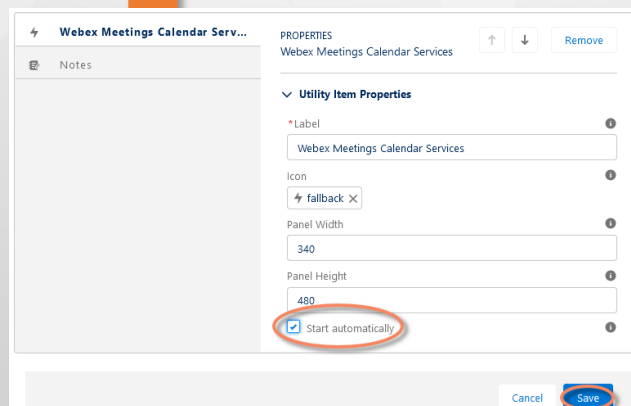
- 6 Search for Webex in the search box and choose **Webex Meetings Calendar Service**:



Search: webex

- Standard (0)
- Custom (0)
- Custom - Managed (2)
 - Webex
 - Webex Meetings Calendar Service**

- 7 Enable **Start automatically** and then click **Save**:



Webex Meetings Calendar Serv...

PROPERTIES

Webex Meetings Calendar Services

▼ **Utility Item Properties**

*Label: Webex Meetings Calendar Services

Icon: fallback X

Panel Width: 340

Panel Height: 480

☒ **Start automatically**

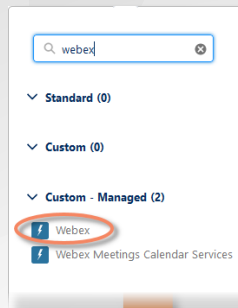
Cancel **Save**



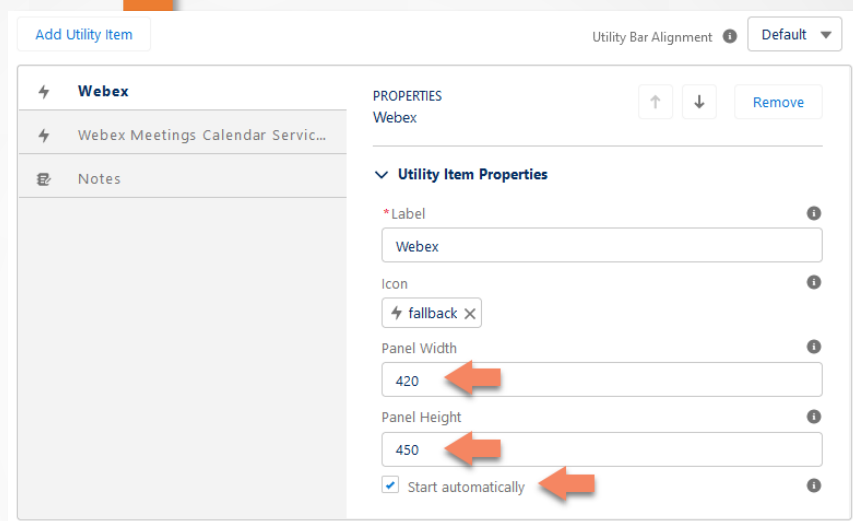
Enable the Webex Meetings Calendar Service and Webex Meetings (Continued)


To enable Webex Meetings Calendar Service and Webex Meetings (continued)...

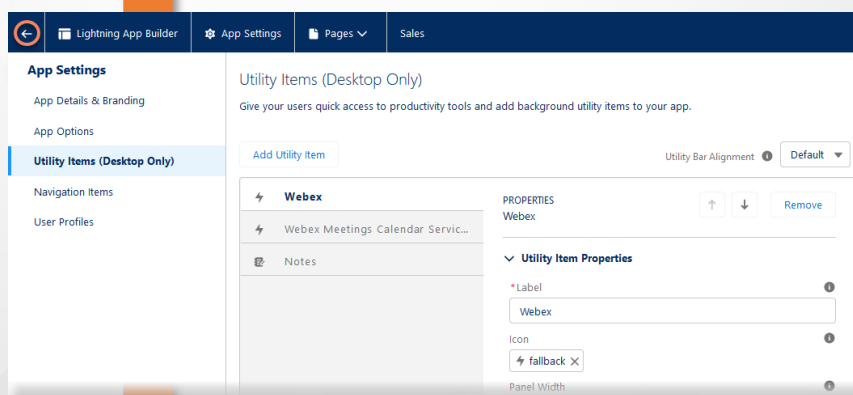
- 8** Click **Add Utility Item** and search for **Webex** in the search box and choose **Webex**



- 9** Enter **420** for **Panel Width**, **450** for **Panel Height** and enable **Start automatically** and then click **Save**:



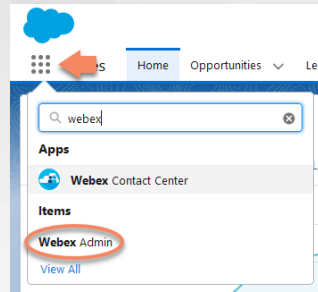
- 10** Click the  button to return to the setup page. You can then close the setup page and return to your main Salesforce page.



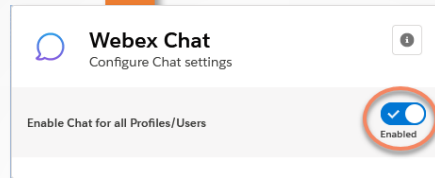

Enable the Webex Meetings Calendar Service and Webex Meetings (Finishing up)

To enable Webex Meetings Calendar Service and Webex Meetings (finishing up)...

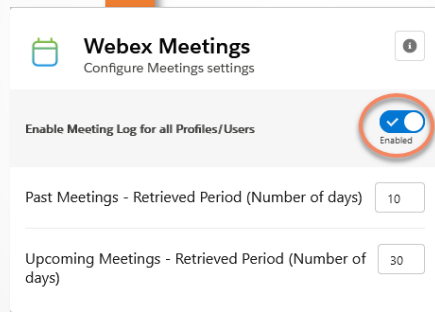
- 11** Open the Salesforce Apps menu, enter **webex** in the search box and choose **Webex Admin** from the **Items** list:



- 12** In the **Webex Chat** panel, enable chat for all profiles/users:

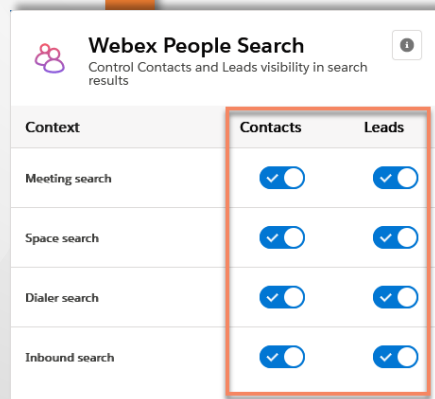


- 13** In the **Webex Meetings** panel enable Meetings Log for all profiles/users:



TIP: Set the number of **Past Meetings** and **Upcoming Meetings** to whatever value you like.

- 14** In the **Webex People Search** panel, enable Contacts and Leads for all entries::

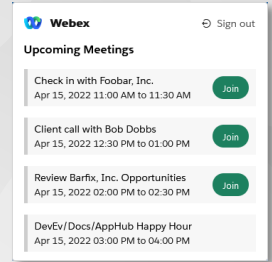


You've now finished the background configuration for Webex Collaboration features.

Add the Webex HomePod to Your Salesforce Home tab...

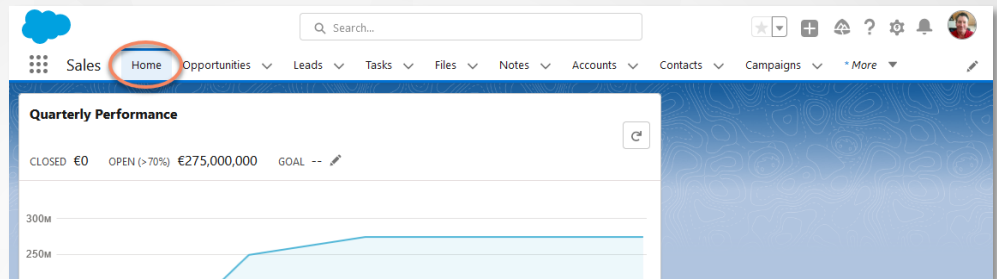


You'll need to add the Webex HomePod to your Salesforce home tab to control your Webex login (the HomePod, specifically, allows you to logout of Webex) and then you can add other useful Webex components such as a Upcoming Meetings and Spaces...

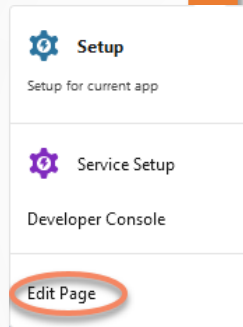


To add the Webex HomePod component to your Salesforce Home tab...

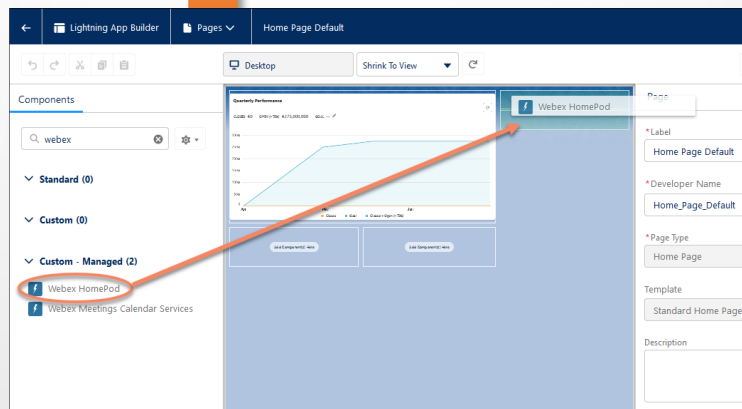
- 1 In the main Salesforce window, choose the **Home** tab:



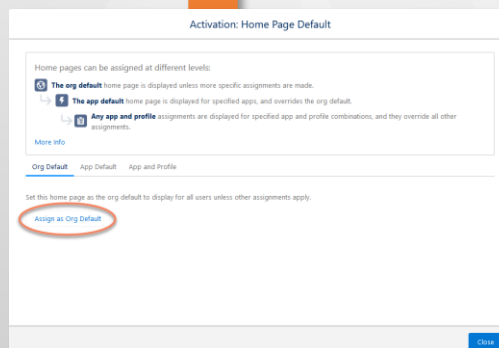
- 2 Click the  icon and then choose **Edit Page**:



- 3 In the Components column, search for Webex and then drag the **Webex HomePod** component to an empty region in the module and then click **Save**:



- 4 Click **Activation** then click **Assign as Org Default**:



Add the Webex HomePod Component to Your Salesforce Home tab (Finishing up)

To add the Webex HomePod component to your Salesforce Home tab (finishing up)...

- 5** Select **System Default** and then click **Save**. You'll see an **Activation Successful** banner appear briefly.

Set as Org Default: Home Page Default

Set this Home page as the org default to display for all users unless other assignments apply.

Current Default	Last Modified	New Default	Last Modified
System Default	-	Home Page Default	John Francis Apr 20, 2022

Cancel Back **Save**

- 6** Click the **Save** button and then click the **←** button to return to the **Home** tab.

Lightning App Builder Pages Home Page Default ? Help

Desktop Shrink To View Changes saved Activation... **Save**

Components

Search: webex

- Standard (0)
- Custom (0)
- Custom - Managed (2)
 - Webex HomePod
 - Webex Meetings Calendar Services

Quarterly Performance

Page > Webex HomePod

Set Component Visibility

Filters

+ Add Filter

- 7** The Webex HomePod is now displayed on your Salesforce **Home** tab. Use the **Sign in** button to sign into your Webex account:

Search...

Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards More

Quarterly Performance

CLOSED €0 OPEN (>70%) €275,000,000 GOAL --

300m 250m 200m 150m 100m 50m 0

Apr May Jun

Legend: Closed Goal Closed + Open (>70%)

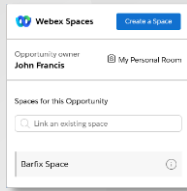
Webex

Please sign in

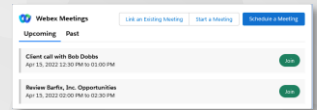
Sign in

The Webex HomePod will now display on your **Home** tab.

Add Other Webex Components to your Salesforce Modules...

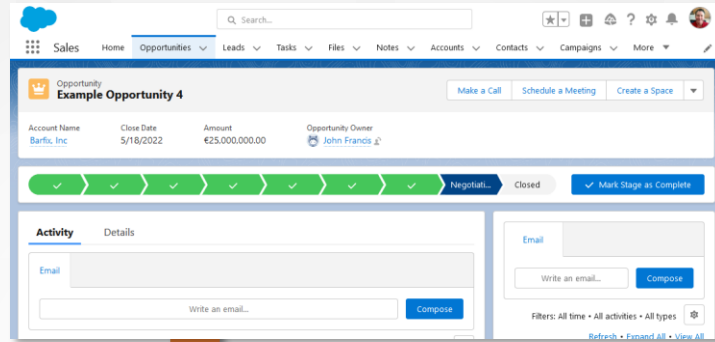


With the HomePod in place you can now add Webex Meetings and Spaces components to your other Salesforce modules, such as opportunities, contacts and more...

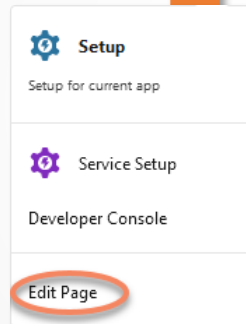


To add other Webex Components to your Salesforce modules...

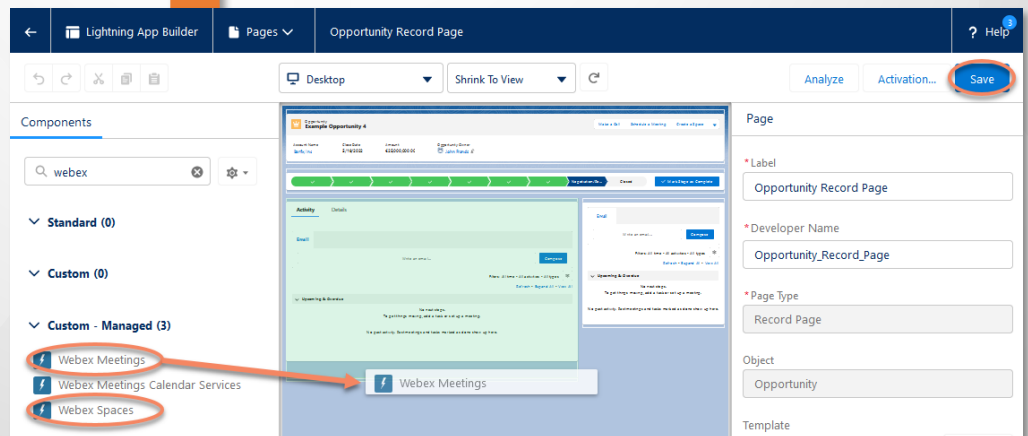
- 1 In the main Salesforce window, choose the tab with the modules you'd like to update. For this example, we'll use **Opportunities**. Begin by opening an Opportunity:



- 2 Click the  icon and then choose **Edit Page**:



- 3 In the Components column, search for Webex and then drag the desired Webex component to a position on the page and then click **Save**:



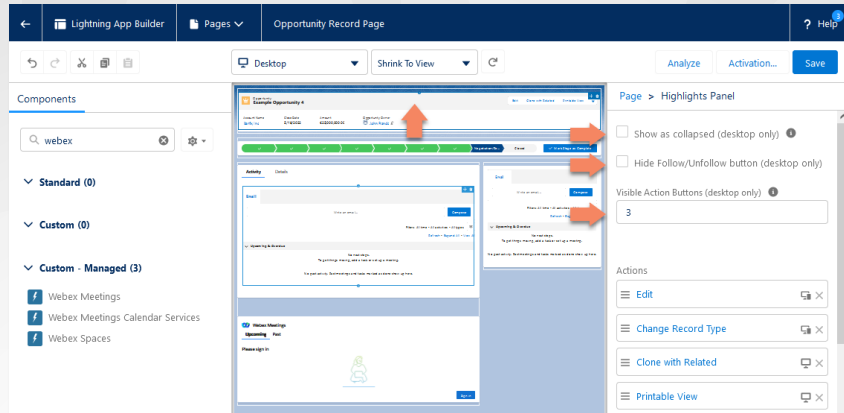
TIP: You can choose either **Webex Meetings** or **Webex Spaces**. In this example we've chosen Webex Meetings. When you click Save, you can also select how many **Past** and **Upcoming** meetings you want the component to display. The Spaces component has no configurable options.



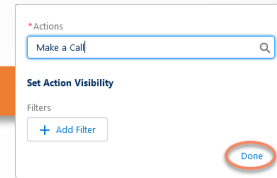
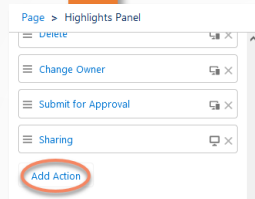
Add Other Webex Components to your Salesforce Modules (Finishing up)

To add other Webex Components to your Salesforce modules (finishing up)...

- 4** Click the module header to open the **Highlights** panel, and uncheck **Show as collapsed** and **Hide Follow/Unfollow** button. Set the Visible Action Buttons to **3**:



- 5** Scroll down in the **Highlights** Panel and click **Add Action**:

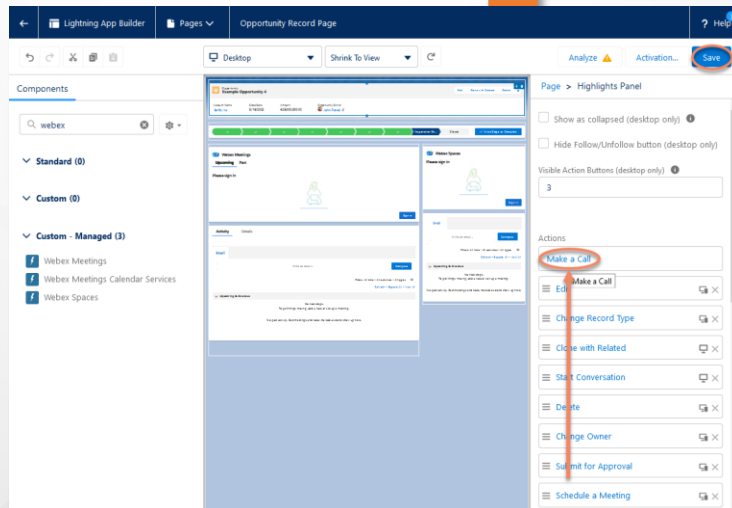


6 Search for one of the following actions:

- **Make a Call**
- **Schedule a Meeting**
- **Create a Space**

Select an action and click **Done**. Repeat for the others

- 7** Select each Webex action and drag it to the top of the **Actions** list, and then click **Save**. Click the **Back** button to return to the module.



The Webex components now display in the module and the Webex actions are available in the quick actions toolbar.



Add the Meetings Calendar Component to Your Modules



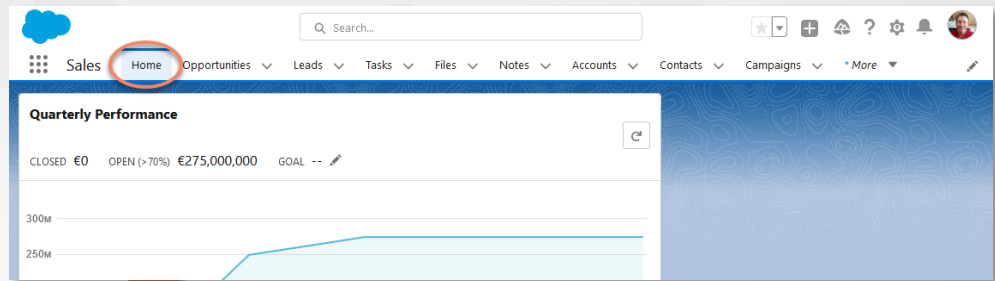
If you don't use the Salesforce toolbar you'll need to add the Webex Meetings Calendar Service component to each module page from which you want to access Webex services.



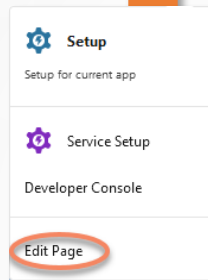
IMPORTANT: Again, you **ONLY** need to complete this step if you are **NOT** using the Salesforce toolbar.

To add the Meetings Calendar Component to your modules...

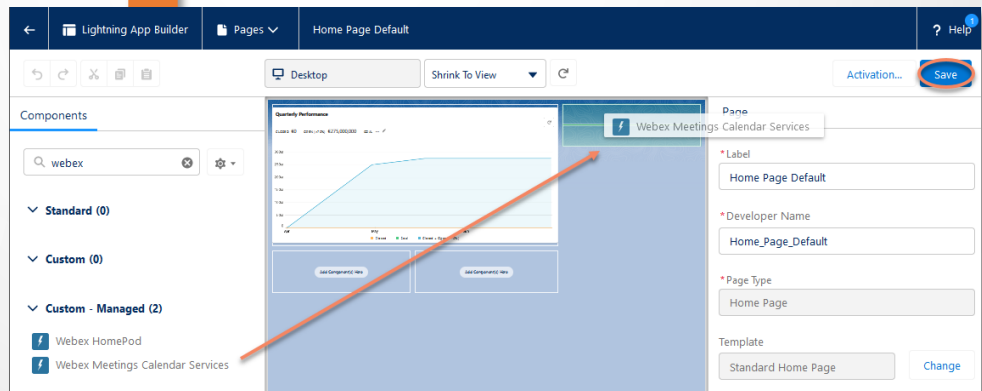
- 1 In the main Salesforce window, choose the module to which you'd like to add the **Webex Meetings Calendar Service**. For this example, we'll use **Home**.




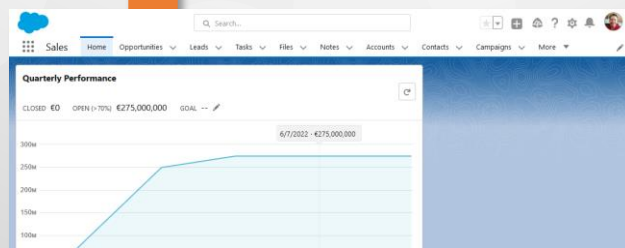
- 2 Click the  icon and then choose **Edit Page**:



- 3 In the Components column, search for Webex and then drag the **Webex Meetings Calendar Service** component to an empty region in the module and then click **Save**:



- 4 Click the  button to return to the modules. Note that you won't see any visible difference in the module.



Repeat these steps for other modules as necessary.

