

## Authorize a New Webex Integration



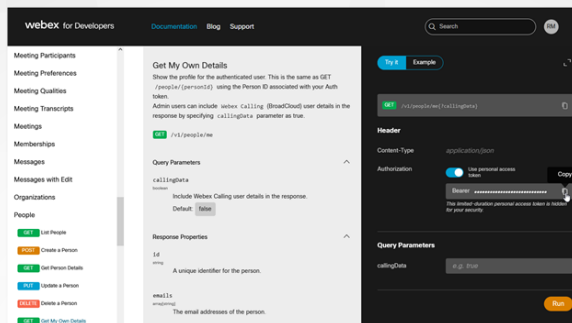
Before you can use any Webex features in Salesforce, you'll need to begin by authorizing a Webex integration in the Webex Admin tab. For this how to, you'll be using a personal access token that you retrieve from the Webex Developer Portal.




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

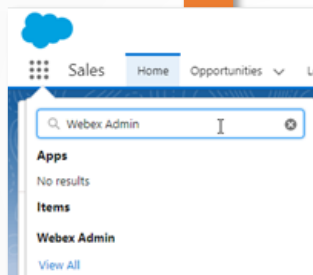
To authorize a Webex Integration...

- 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**.

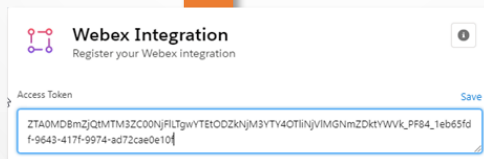


Make sure the **Use personal access token** toggle button is enabled (toggled to blue) and click the  icon in the token field.

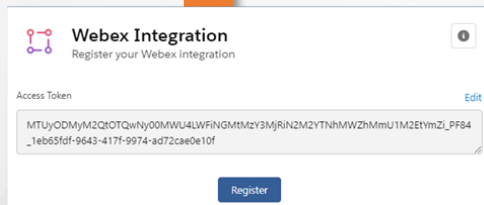
- 3 In another browser tab or window, navigate to the **Webex Admin** tab in Salesforce Cloud.



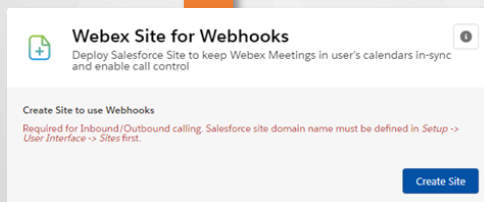
- 4 Paste the access token in the **Access Token** field within the **Webex Integration** widget on the Webex Admin page. Click **Save**.



- 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.



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

You can now access Webex features in Salesforce.



## Enable Launch a Call from the Webex Dialer...

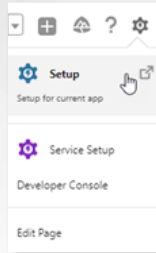


The Webex Dialer is a widget that is available in the Utility bar for quick outbound calls from within the Sales app. You can enable the Dialer for any Salesforce object that is set up with the **Make a Call** button.

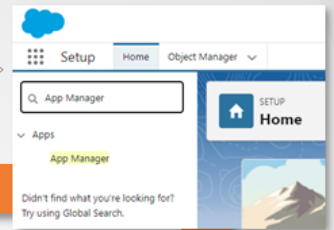
To enable the dialer for users in Salesforce Cloud, we'll add the dialer to utility bar items. This procedure will walk you through the process...

## To enable launching a call from the Webex Dialer...

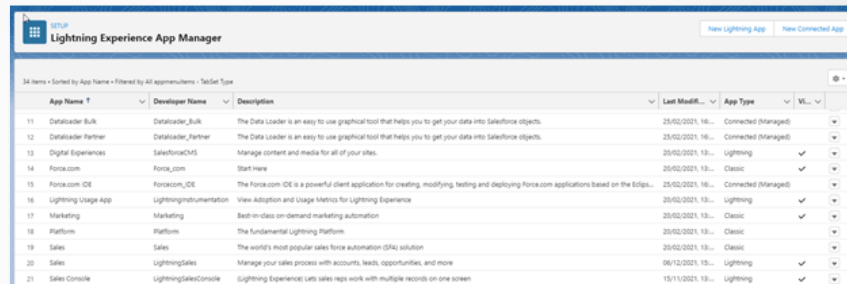
- 1 Click the gear icon on the top right menu in Salesforce Cloud, and then click **Setup**. A new tab opens with the Setup page:



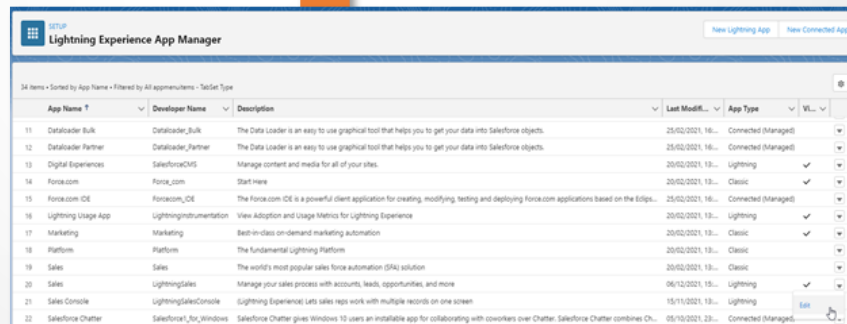
- 2 Search for **App Manager** in the search box on the top left of the Setup page, and then click **App Manager** in the search result.



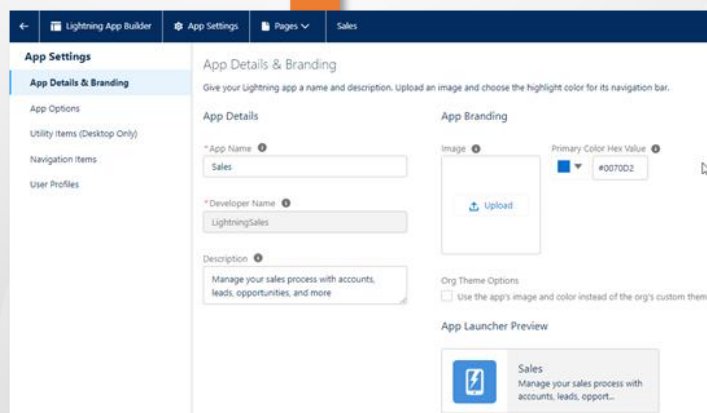
- 3 In the list of apps, scroll to find your **Sales** app.



- 4 Click the arrow icon for the Sales app identified above, and then click **Edit**. An 'App Details & Branding' page displays (example *LightningSales* app).



- 5 On the App Details & Branding page, click **Utility Items (Desktop Only)** in the left panel.



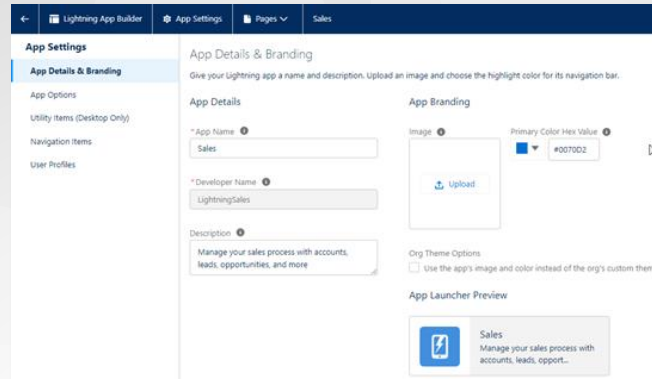
- In the Webex utility item **PROPERTIES** box, set **Panel Width** to 420, **Panel Height** to 460, and check the **Start automatically** checkbox. Click **Save**.
- Click **Webex Meetings Calendar Services** (below the 'Webex' utility item), and again check the **Start automatically** checkbox. Click **Save**. The Webex Meetings Calendar Service synchronizes Webex meetings with related Salesforce events.
- Click the back arrow at the top left of the page to navigate back to the Setup page.



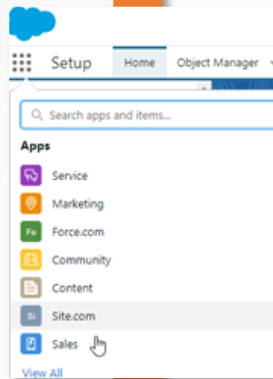
## Enable Launch a Call from the Webex Dialer (Continued)...

To enable launching a call from the Webex Dialer (continued)...

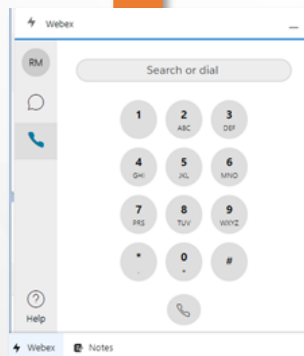
- 5 On the App Details & Branding page, click **Utility Items (Desktop Only)** in the left panel.



- 6 To verify the Webex Dialer is available, navigate to the **Sales** app.

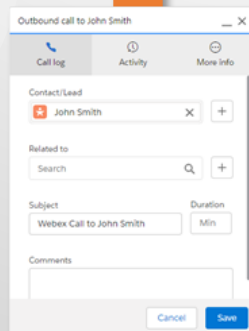


- 7 Click the Webex item in the utility bar at the bottom left: the Webex dialer should popup.



- 8 Click the phone icon in the Webex utility and search for a lead by name or dial a lead's number directly using the number pad. Make a test call to the lead.

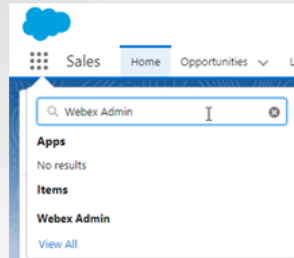
- 9 After the call is initiated and connected, an Outbound call log popup displays on the bottom right of the utility bar where call details can be logged and saved.



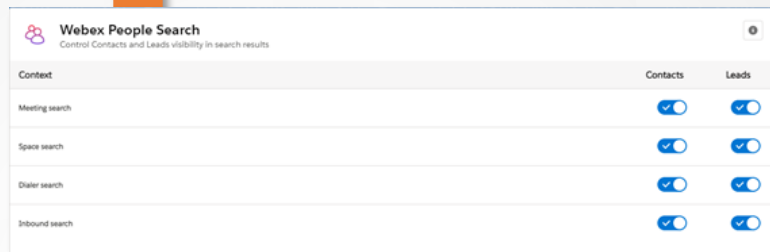
## Enable Launch a Call from the Webex Dialer (Finishing Up)

To enable launching a call from the Webex Dialer (finishing up)...

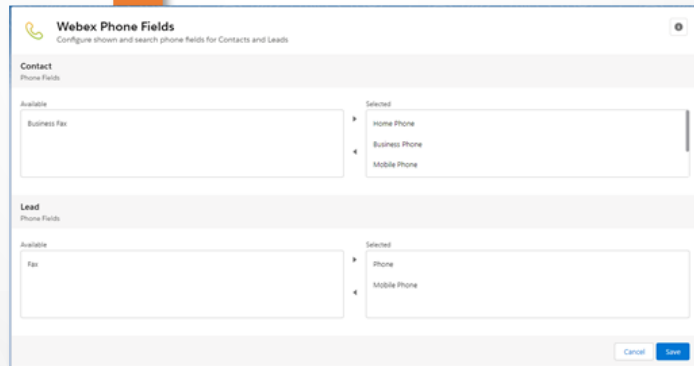
- 1 Navigate to the **Webex Admin** tab in Salesforce Cloud.



- 2 Scroll to find the **Webex People Search** widget and enable **Contacts** and **Leads** (toggle both to blue) for the **Dialer search** item.

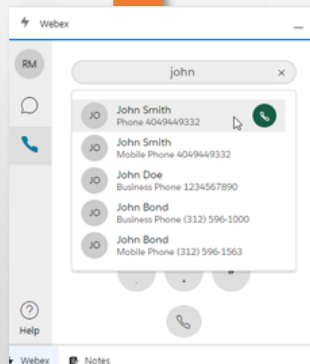


- 3 Select Phone fields to display for leads and contacts in the Webex dialer:
  - a. On the same Webex Admin page, scroll to find the **Webex Phone Fields** widget.
  - b. Select a phone type in the **Available** box for a **Contact** or **Lead** and click the right arrow to move it to the **Selected** box. Click **Save**.



**TIP::** This controls which phone fields appear when you search in the dialer.

- 4 The selected phone type will now be available in the Webex dialer.



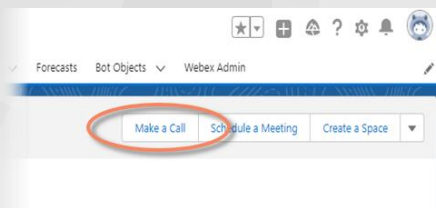
The Webex Dialer is now enabled for your application.



## Enable Make a Call from the Salesforce Leads Page



Calls can also be launched from a lead page using the **Make a Call** button

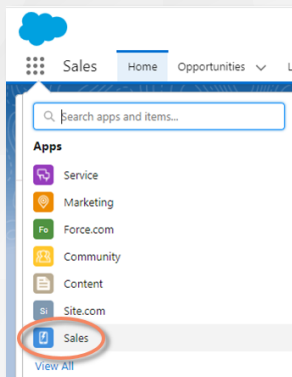


**TIP::** You can enable Webex calling from any Salesforce object that has a **Make a Call** button, including Opportunities, Accounts, Cases, etc.

To enable the **Make a Call** button (if it isn't already enabled)...

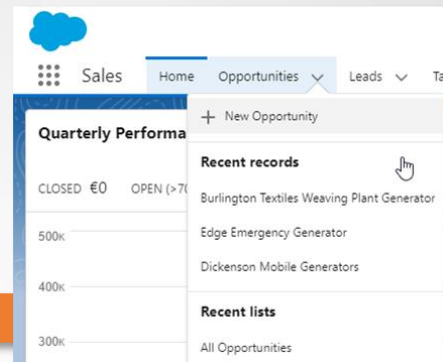
1

On a lead page, navigate to the **Sales** app:



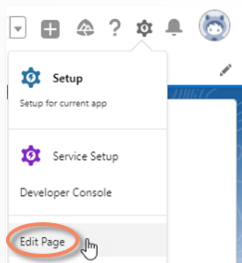
2

On the **Sales** page, click the arrow next to the **Opportunities** tab in the top menu, and select a recent opportunity, or click **All Opportunities** and click on an opportunity. This will display the page for the opportunity



3

In the open opportunity, click the **Setup** icon at the top right, and then click **Edit Page**. The **Opportunity Record Page** displays.



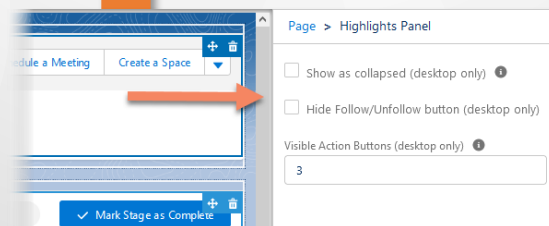
4

On the **Opportunity Record Page**, click anywhere in the page banner at the top:



5

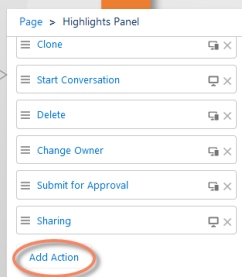
The **Highlights** panel should display in the right panel



**TIP::** We recommend setting the **Visible Action Buttons** to 3.

6

Scroll down in the **Highlights** panel to the bottom and choose **Add Action**:

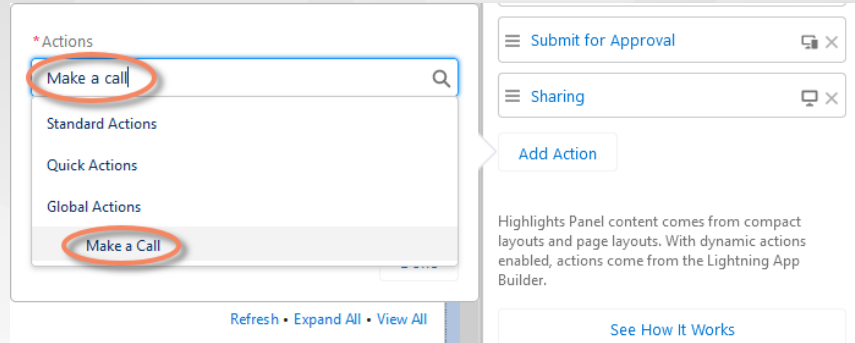




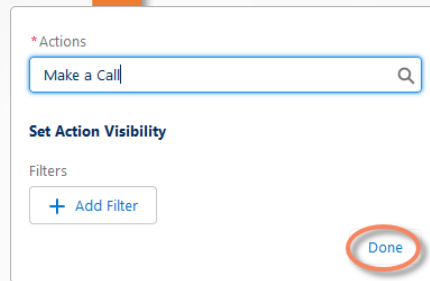
## Enable Make a Call from the Salesforce Leads Page (Finishing Up)

To enable the Make a Call button (finishing up)...

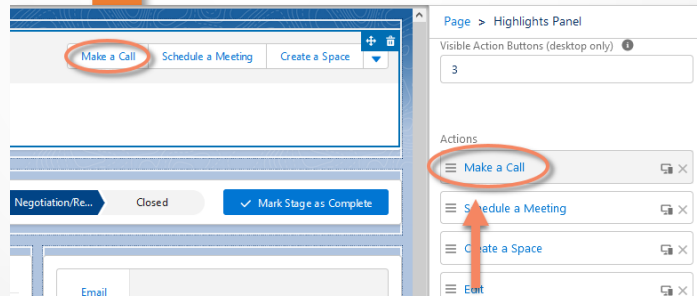
- 7** In the search box enter 'Make a call' and then select **Make a Call** from the list



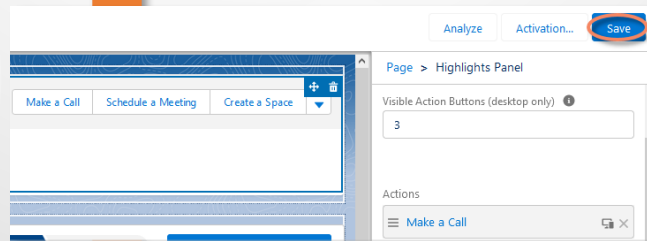
- 8** Click **Done** to add the 'Make a Call' button to the list of Actions.



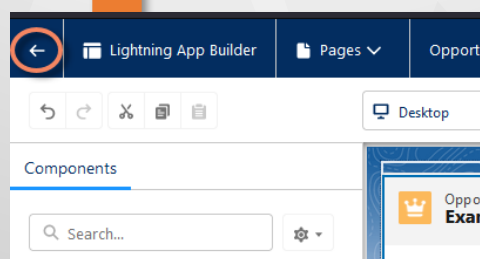
- 9** Since the number of buttons on a lead page is limited by the number in the **Visible Action Buttons** field, click and drag the **Make a Call** action to the top of the list of actions. You'll see it appear in the toolbar.



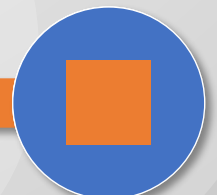
- 10** Click the **Save** button at the top right of the page:



- 11** Click the **Back** button at the top left of the page:



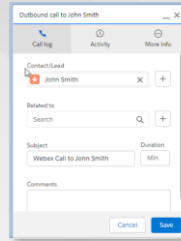
The Make a Call button is now enabled for your lead pages.



## Enable Outbound Call Logging



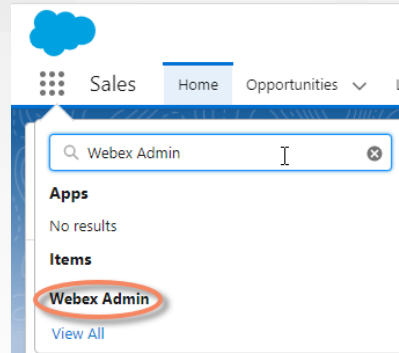
As an Admin, you can enable logging of calls made by users of the Salesforce portal. Logging call details save the calls as completed Tasks for a user in the portal.



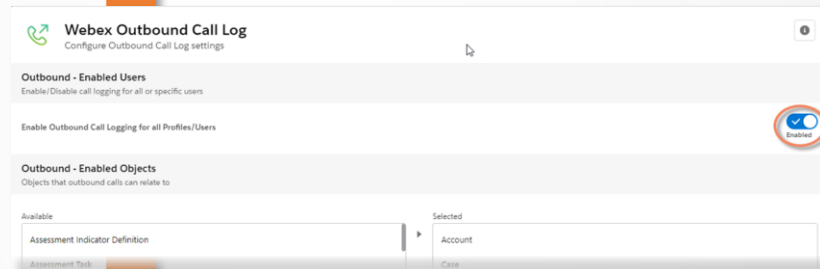
The **Outbound call** log popup displays in the utility bar at the bottom right when a call is made using the Webex Dialer.

To enable outbound call logging...

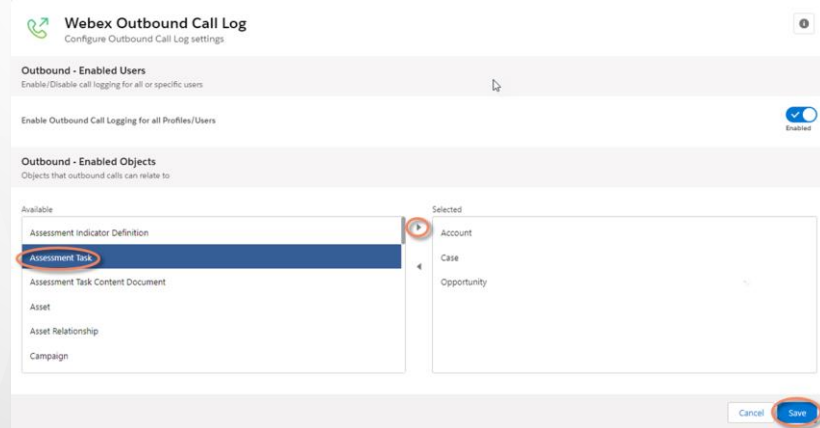
- 1 Navigate to the **Webex Admin** tab in Salesforce



- 2 Scroll to find the **Webex Outbound Call Log** widget on the Webex Admin tab and toggle the **Enabled** button to blue to enable outbound call logging for all users.

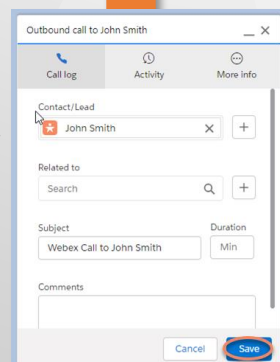


- 3 Select an object that users can save call logs to as an activity in **Outbound-Enabled Objects** section of the Webex Outbound Call Log widget. Click the right arrow to add the object and then click **Save**.



- 4 Now when a call is initiated and connected, an **Outbound Call Log** pops up at the bottom right of the utility bar.

You can enter details of the call in the call log popup and click **Save** to save the call details.

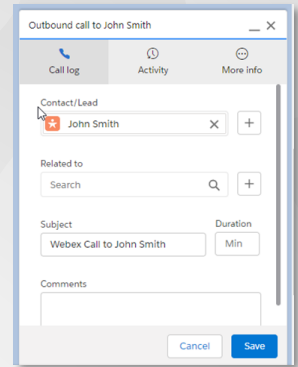


Outbound Call Logging is now enabled.

## Configure the More Info tab in the Outbound Call Logging Popup...

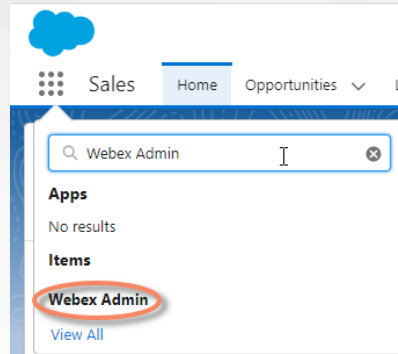


The More Info tab within the Outbound call logging popup helps you select what related object(s) should appear in the tab, the field to be used to find this related object, and the fields from the related object that should be displayed as additional info in the tab.

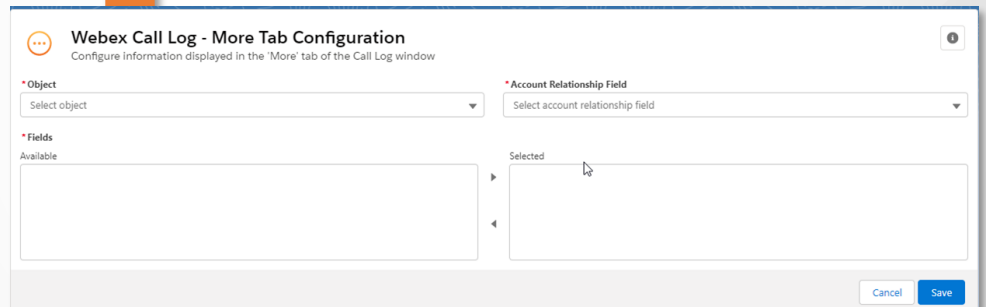


To configure the More Info tab in the Outbound Call Logging popup...

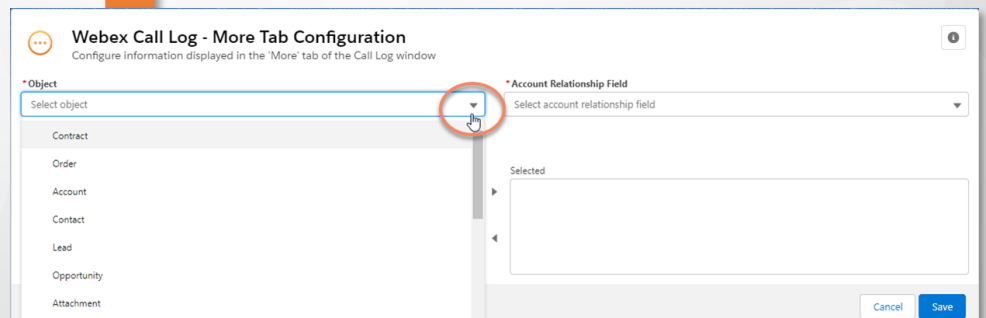
- 1 Navigate to the **Webex Admin** tab in Salesforce



- 2 On the Webex Admin tab, scroll to find the **Webex Call Log - More Tab Configuration** widget on the admin page:



- 3 Click the **Object** drop down to select an object to display in the **More Info** tab

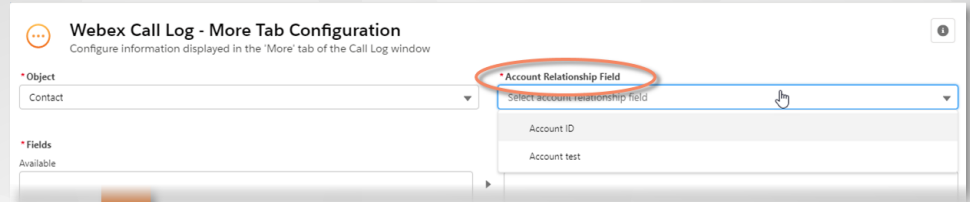




## Configure the More Info tab in the Outbound Call Logging Popup (Finishing Up)

To configure the More Info tab in the Outbound Call Logging popup (finishing up)...

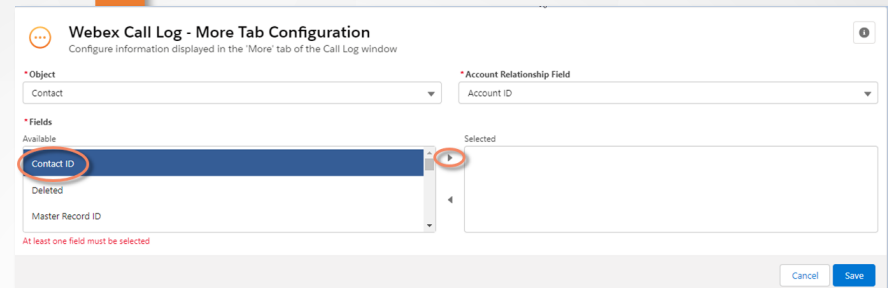
- 4** Click the **Account Relationship Field** dropdown to select how the object is related to the account:



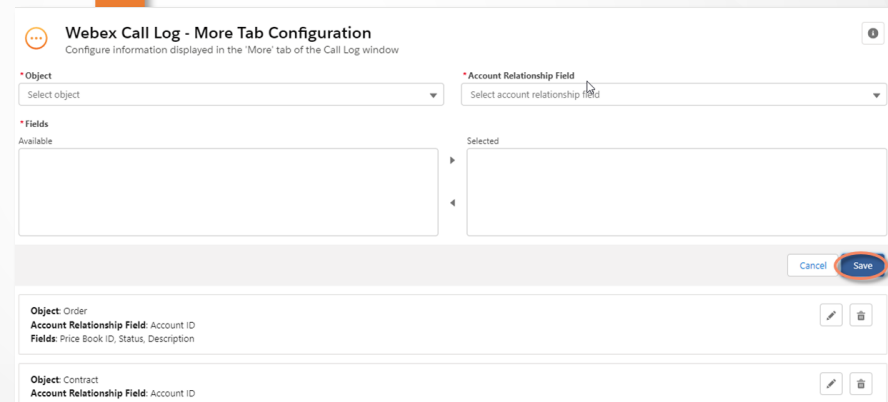
- 5** Select one or more fields in the **Fields** multiple select box and click the right arrow to add the fields to the **Selected** box.



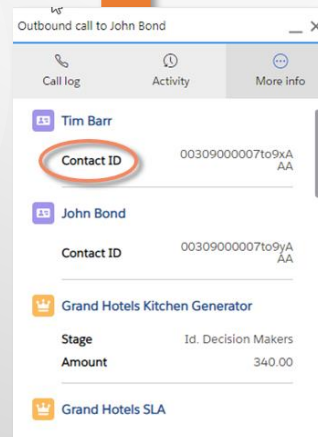
**NOTE:** The fields you select will be displayed in the **More Info** tab.



- 6** Click **Save**. A 'Custom Field inserted successfully' message displays at the top of page, and the added object displays in the list of objects below the **Cancel** and **Save** buttons:



- 7** Now, when a call is initiated and connect, you'll see the additional fields displayed in the More Info tab in the Call Log pop up:



You've now customized the More Info display for your Webex calls.