

Authorize a New Webex Integration



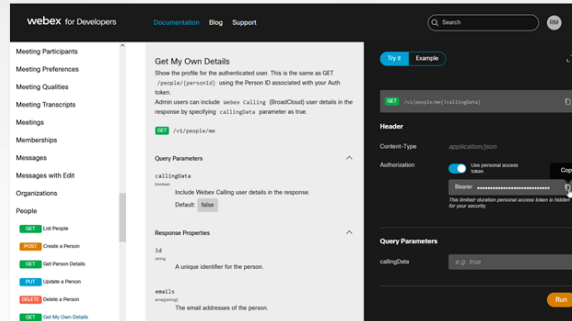
Before you can use any Webex features in Salesforce, you'll need to begin by authorizing a Webex integration in the Webex Admin tab. For this how to, you'll be using a personal access token that you retrieve from the Webex Developer Portal.




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

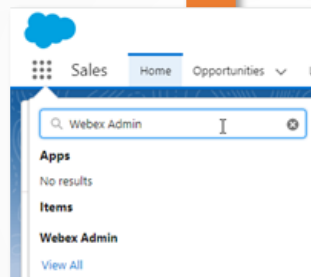
To authorize a Webex Integration...

- 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**.

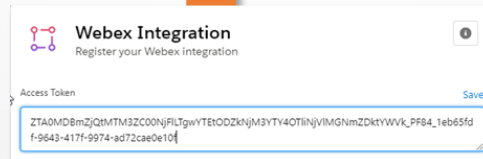


Make sure the **Use personal access token** toggle button is enabled (toggled to blue) and click the  icon in the token field.

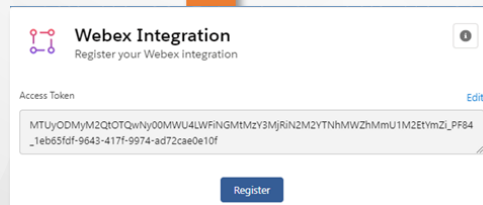
- 3 In another browser tab or window, navigate to the **Webex Admin** tab in Salesforce Cloud.



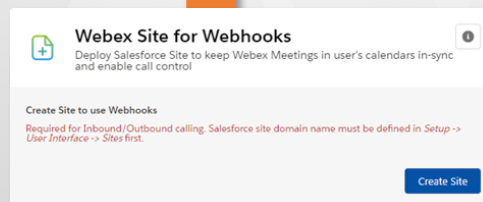
- 4 Paste the access token in the **Access Token** field within the **Webex Integration** widget on the Webex Admin page. Click **Save**.



- 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.



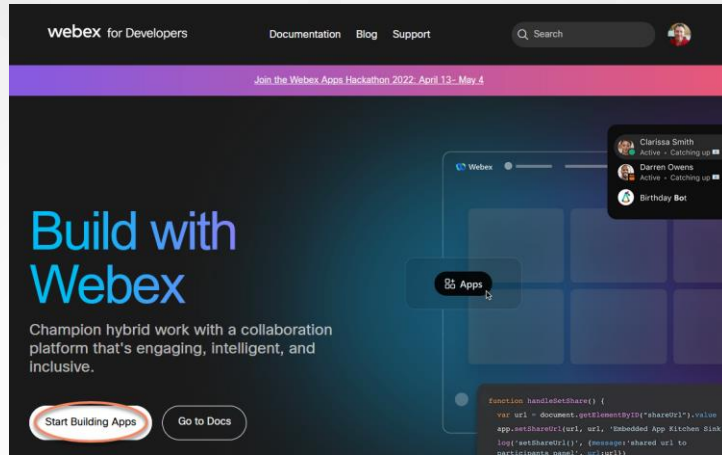
Enable Webex Space Notifications in Salesforce...



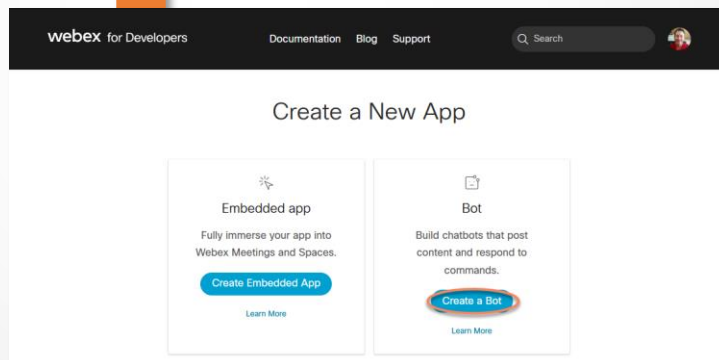
You can create notifications for various events associated with Salesforce objects by creating a Webex Bot and configuring the appropriate settings for accounts, opportunities, cases, orders, contracts, or leads. In this section we'll show you how to configure a new Webex Bot and then we'll create a new notification that will pop up in a Webex space when an Opportunity moves to the Won state in Salesforce...

To enable Webex space notifications in Salesforce...

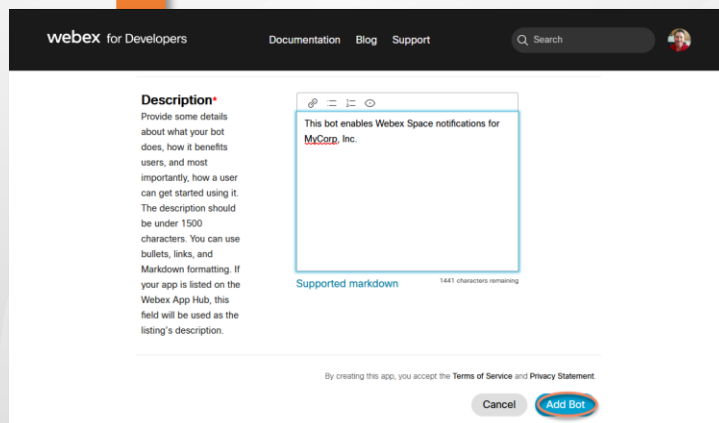
- 1 Login to [Webex for Developers](#) and click **Start Building Apps**:



- 2 In the **Create an App** page, click **Create a Bot**:



- 3 Enter the following information for your new bot:
 - Bot name
 - Bot username
 - Icon
 - Description
 And click **Add Bot**:



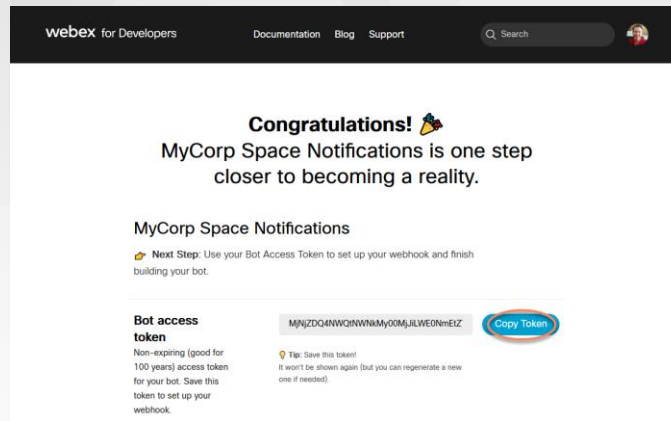
TIP: Prefix your company name to the **Bot name** and **Bot username** to make sure they are unique.



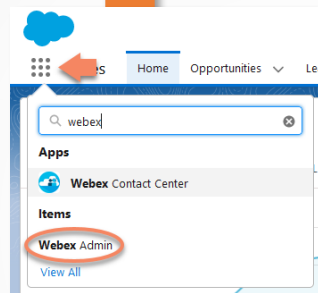
Enable Webex Space Notifications in Salesforce (Finishing up)...

To enable Webex space notifications in Salesforce (finishing up)...

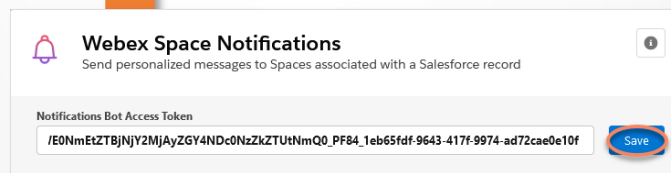
- 4** In the **Congratulations** page, click **Copy Token** and save your new bot token so you can access it in the next steps:



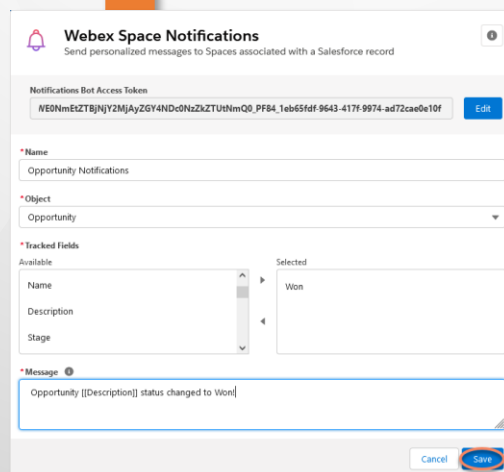
- 5** In your Salesforce page, open the Salesforce Apps menu, enter **webex** in the search box and choose **Webex Admin** from the Items list:



- 6** Scroll to the bottom of the Webex Admin page, paste your bot token into the **Notifications Bot Access Token** text box and click **Save**:

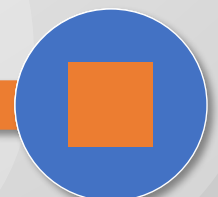


- 7** Enter a **Name** for your new notification and then choose the **Object** you're interested in. Depending upon the Object you've selected, you'll see different listings of tracked fields. In this case we've choose the **Won** status for the **Opportunity** object. For the message, we've referenced the contents of the **Opportunity Description** field by enclosing it in double square brackets, `[[]]`. Click **Save** when done.



TIP: If you scroll down below Webex Space Notifications, you'll see a variety of existing notifications that you can use as templates. You can also delete notifications you don't need.

If you want to create notifications for objects that **aren't** accounts, opportunities, cases, orders, contracts, or leads, continue on...



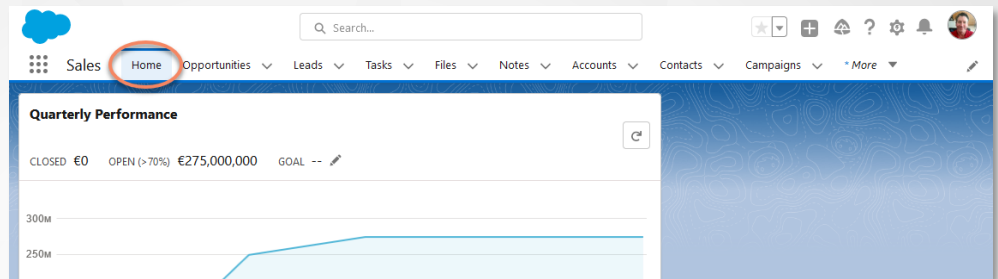
Add Webex Space Notifications to Additional Salesforce Objects...



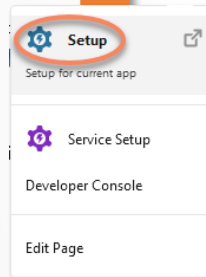
If you'd like to create notifications for Salesforce objects that are **NOT** accounts, opportunities, cases, orders, contracts, or leads, you'll need to use the Salesforce **Flow Builder**. In this section we'll show you how to configure a Salesforce flow that will let you add Webex space notifications to any given Salesforce object...

To add Webex Space notifications to additional Salesforce objects...

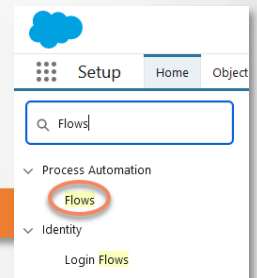
1 In the main Salesforce window, choose the **Home** tab:



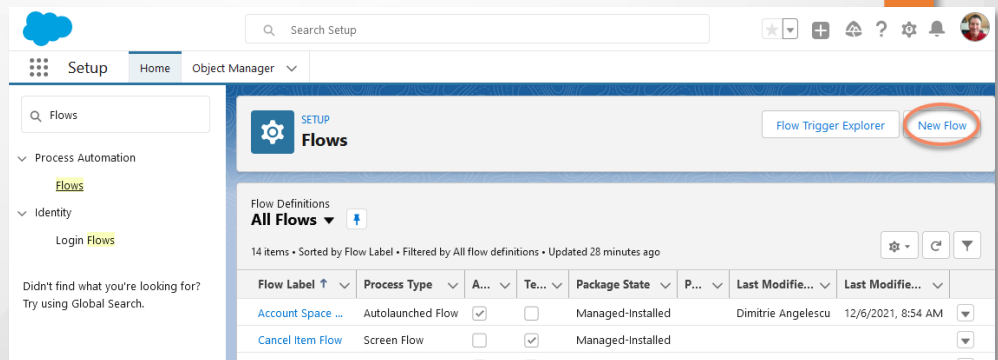
2 Click the  icon and then choose **Setup**:



3 In the **Quick Find** search box, enter 'Flows' and then choose **Flows** from **Process Automation**:



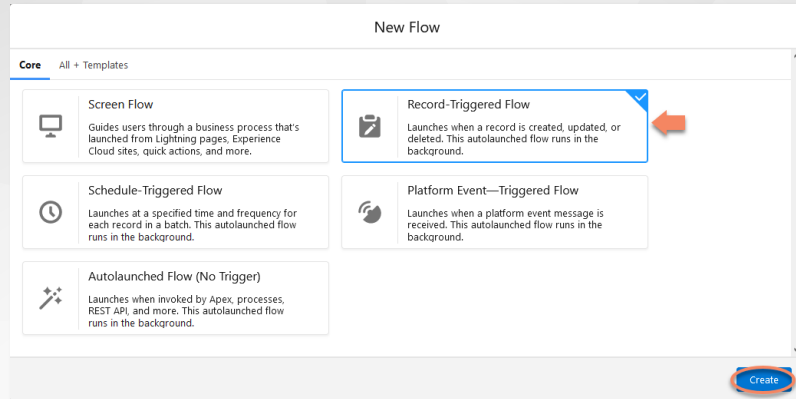
4 Click **New Flow**:



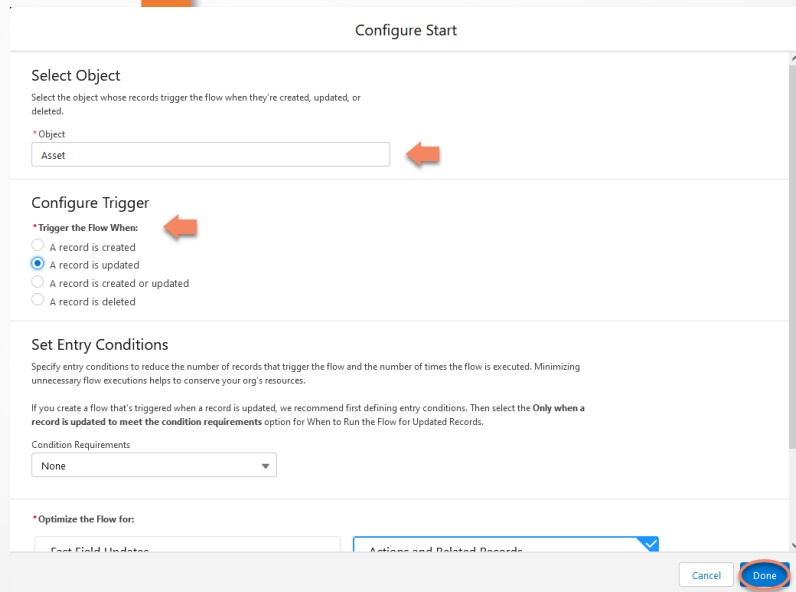
Add Webex Space Notifications to Additional Salesforce Objects (Continued)...

To add Webex Space notifications to additional Salesforce objects (continued)...

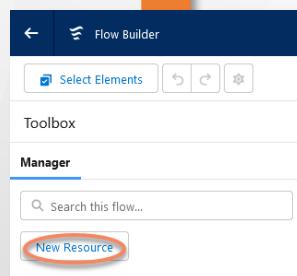
5 In the **New Flow** dialog, select **Record-Triggered Flow** and then click **Create**:



6 In the **Configure Start** dialog, search for and select the object you're interested in, and then choose **A record is updated** from the list under **Configure Trigger**. Click **Done**:



7 From the **Toolbox**, click **New Resource**:

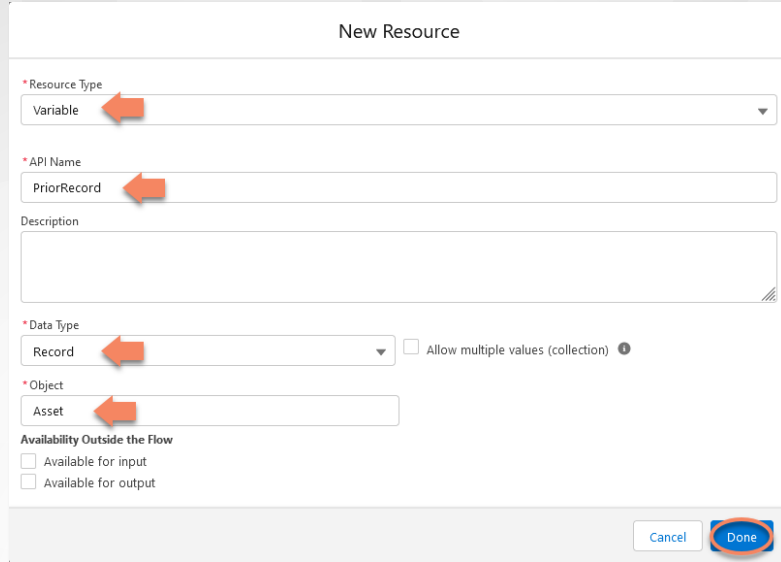



Add Webex Space Notifications to Additional Salesforce Objects (Continued)...

To add Webex Space notifications to additional Salesforce objects (continued)...

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In the **New Resource** dialog, choose *Variable* as the **Resource Type**, *PriorRecord* as the **API Name**, *Record* as the **Data Type** and find your Object in the **Object** search box. Click **Done**:



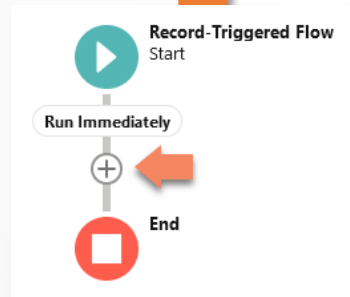
The 'New Resource' dialog box is shown with the following fields and values:

- Resource Type:** Variable
- API Name:** PriorRecord
- Description:** (empty text area)
- Data Type:** Record
- Object:** Asset
- Availability Outside the Flow:**
 - ☐ Available for input
 - ☐ Available for output

Buttons at the bottom: Cancel, Done.

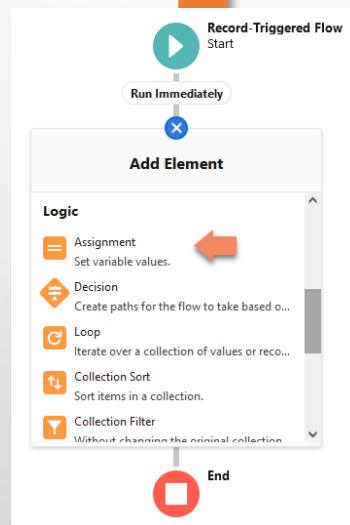
9

In the body of the Flow Builder, click (+) to add a new element:



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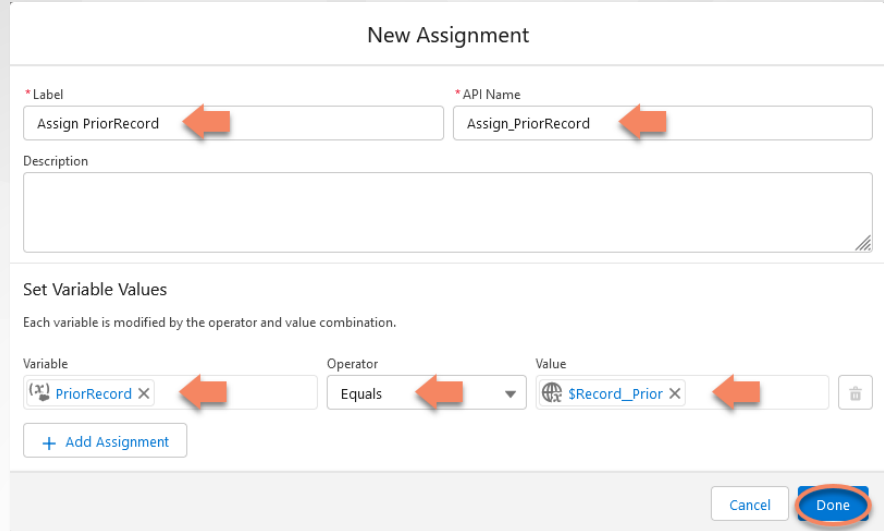
Under **Add Element**, scroll down and select **Assignment**:



Add Webex Space Notifications to Additional Salesforce Objects (Continued)...

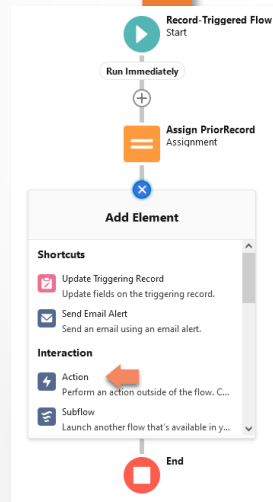
To add Webex Space notifications to additional Salesforce objects (continued)...

- 11** In the **New Assignment** dialog, set the Label to *Assign PriorRecord*. The **API Name** is auto-assigned. For **Variable**, choose *PriorRecord*, for **Operator** choose *Equals*, and for **Value**, choose *\$Record_Prior*. Click **Done**:

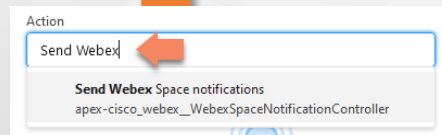


The 'New Assignment' dialog box is shown. It has two input fields at the top: 'Label' with the value 'Assign PriorRecord' and 'API Name' with the value 'Assign_PriorRecord'. Below these is a 'Description' field. Under the 'Set Variable Values' section, there is a table with three columns: 'Variable', 'Operator', and 'Value'. The 'Variable' column contains 'PriorRecord', the 'Operator' column contains 'Equals', and the 'Value' column contains '\$Record_Prior'. There is a '+ Add Assignment' button below the table. At the bottom right, there are 'Cancel' and 'Done' buttons. Red arrows point to the 'Label', 'API Name', 'Variable', 'Operator', and 'Value' fields.

- 12** In the body of the Flow Builder, after **Assign PriorRecord**, click (+) to add a new element, and then select **Action** from the list of Interactions:



- 13** In the **Action** search box, enter *Send Webex* and then select **Send Webex Space notifications** from the search results:

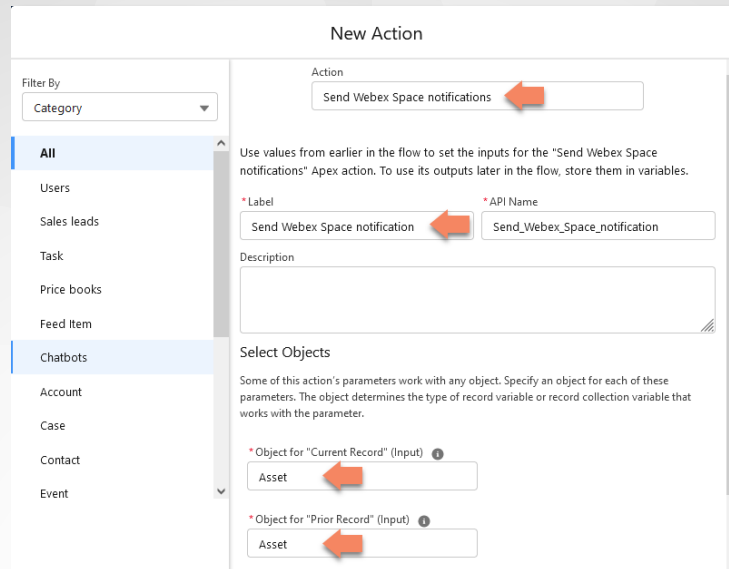


The 'Action' search results are shown. The search box contains the text 'Send Webex'. Below the search box, the results are displayed, including 'Send Webex Space notifications' and 'apex-cisco_webex__WebexSpaceNotificationController'. A red arrow points to the 'Send Webex' text in the search box.

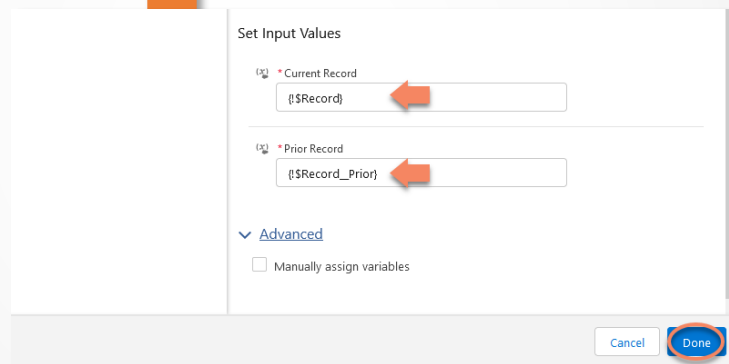
Add Webex Space Notifications to Additional Salesforce Objects (Finishing up)...

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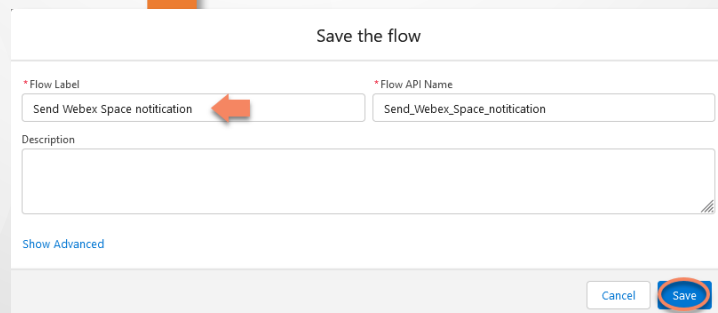
- 14** In the **New Action** dialog, enter *Send Webex Space notifications* in the **Action** text box, and *Send Webex Space notification* in the **Label** text box. The **API Name** is automatically populated. Choose your object type for both **Object for Current Record** and **Object for Prior Record**:



- 15** Scroll down and choose *\$Record* for **Current Record** and *\$Record_Prior* for **Prior Record**. Click **Done**:



- 16** In the toolbar click **Save**, and then enter *Send Webex Space notification* as the **Flow Label**. The **Flow API Name** is auto-populated. Click **Save**:



- 17** In the toolbar click **Activate**:



Your notification workflow is complete!

