Getting Started with Cisco Webex Contact Center 1.0 for Salesforce

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Change History

This table lists changes made to this guide. Most recent changes appear at the top.

Change	See	Date
Updated widget dimension details.	Widget Management, on page 1	December 2020
Updated CTI general information details.	Set Up CTI for Cisco Webex Contact Center, on page 5	
New topic added.	Widget Management, on page 1	June 2020
Initial Release of Document		July 2019

About this Guide

The Getting Started with Cisco Webex Contact Center for Salesforce guide describes how to integrate Cisco Webex Contact Center into Salesforce lightning. This guide also describes how to configure the Cisco Webex Contact Center for Salesforce client and play recording feature, make inbound and outbound calls. In addition, this guide provides steps to generate and run reports.

Audience

This document is intended for Salesforce users who use Cisco Webex Contact Center to run their contact centers.

Related Documents

To view the list of Cisco Webex Contact Center documents, go to page https://www.cisco.com/c/en/us/support/customer-collaboration/webex-contact-center/series.html.

Communications, Services, and Additional Information

- To receive timely, relevant information from Cisco, sign up at Cisco Profile Manager.

- To get the business impact you're looking for with the technologies that matter, visit Cisco Services.

- To submit a service request, visit Cisco Support.

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- To find warranty information for a specific product or product family, access Cisco Warranty Finder.

Cisco Bug Search Tool

Cisco Bug Search Tool (BST) is a web-based tool that acts as a gateway to the Cisco bug tracking system that maintains a comprehensive list of defects and vulnerabilities in Cisco products and software. BST provides you with detailed defect information about your products and software.

Documentation Feedback

Provide your comments about this document to: mailto:contactcenterproducts_docfeedback@cisco.com.

Conventions

This guide uses the following conventions.

Convention	Description
boldface font	Boldface font is used to indicate commands, such as user entries, keys, buttons, and folder and submenu names. For example: • Choose **Edit** > **Find** • Click **Finish**.
italic font	Italic font is used to indicate the following: • To introduce a new term. Example: A *skill group* is a collection of agents who share similar skills. • For emphasis. Example: *Do not* use the numerical naming convention. • An argument for which you must supply values. Example: IF (*condition, true-value, false-value*) • A book title. Example: See the *Cisco Webex Contact Center Getting Started Guide*.

`window` font	Window font, such as Courier, is used for the following:
	
	• Text as it appears in code or information that the system displays. Example:
	
	`<html><title> Cisco Systems,Inc. </title></html>`
	
	• File names. Example: `tserver.properties`.
	
	• Directory paths. Example:
	
	`C:\Program Files\Adobe`

Get Started with Cisco Webex Contact Center for Salesforce

Features Supported in Cisco Webex Contact Center for Salesforce

The Cisco Webex Contact Center for Salesforce offers the following benefits:

• Receive inbound and place outbound (click-to-dial) calls.

• Automatic customer record screen pop.

• Automatic call activity log for better customer interaction in Customer Relationship Manager (CRM).

• Play recording feature from CRM Salesforce interface.

• Generate report for Cisco Webex Contact Center on the Salesforce interface.

Widget Management

The widget is essentially an iFrame HTML element. The dimensions of the widget refer to the dimensions of the iFrame. For example, if you use a report widget with many rows, you may want to adjust the widget dimensions or the screen resolution to make the report easier to read or make more rows appear on the screen without needing to scroll down.

The required dimensions for widget connectors are as follows:

• iFrame width must be between 550 pixels and 600 pixels.

• iFrame height can be higher or lower than 550 pixels.

Install Cisco Webex Contact Center for Salesforce

Before you begin

If you have an older version of Cisco Webex Contact Center App, then uninstall the old version before installing the latest version. For more information, see .

Procedure

Step 1   Open a supported browser and enter the following URL: https://appexchange.salesforce.com/

Step 2   In the search box, type `Cisco Webex Contact Center for Salesforce`.

The Cisco Webex Contact Center App page is displayed on Salesforce AppExchange.

Step 3   Click **Get It Now** and choose either of the options to install:

- **Install in Production**—Choose when you've tested and is ready to go public.
- **Install in Sandbox**—Choose when you've to test against a copy of the production org. The login URL is different for Sandbox environment. Once you've tested in the Sandbox, you must install it on a production environment using the option **Install in Production**.

Note   To know more about the other installation options available, see the Salesforce document https://help.salesforce.com/articleView?id=distribution_installing_packages.htm&type=5.

Step 4   After the installation is complete, click **Done**.

You can find the installed Cisco Webex Contact Center App in the **App Launcher**.

Uninstall Cisco Webex Contact Center for Salesforce

To uninstall the Cisco Webex Contact Center for Salesforce:

Procedure

Step 1   In Salesforce, navigate to **Setup**.

Step 2   Enter `Object Manager` in the Quick Find and click **Task > Page Layouts**.

Step 3   Click **Page Layout Assignment > Edit Assignment**.

Step 4   Select all the profiles that are associated with the **Cisco Webex Contact Center Task Layout** and from the **Page Layout To Use** drop-down list, select any other Page Layout.

Note   Ensure that there is no profile that is associated with Cisco Webex Contact Center Task Layout.

Step 5   Click **Save**.

Step 6   Navigate to **Setup**.

Step 7   Enter **Installed Packages** in the Quick Find and click **Installed Packages**. Or, select **Apps** > **Packaging** > **Installed Packages** from the PLATFORM TOOLS section.

Step 8   Click **Uninstall** for the **Webex Contact Center for Salesforce** package name.

Step 9   In the Uninstalling a Package page, confirm the uninstallation by selecting "Yes, I want to uninstall this package and permanently delete all associated components."

Step 10   Click **Uninstall**.

Configure Cisco Webex Contact Center for Salesforce

The following topics help you configure the Cisco Webex Contact Center for Salesforce:

Set Up CTI for Cisco Webex Contact Center

You must set up computer-telephony integration (CTI) system to enable Cisco Webex Contact Center.

Note   This procedure is not applicable for R10 deployments. In the R10 Webex Contact Center for Salesforce App, these details are automatically configured.

Procedure

Step 1   In Salesforce, navigate to **Setup**.

Step 2   Enter `Call Center` in the Quick Find and click **Call Centers**.

Step 3   Click the **Edit** link corresponding to the Webex Contact Center.

Step 4   In General Info details, update the following:

- CTI:

  `https://<hostname>/ada-ws/webexcc-desktop/crmAgent.html?height=600&width=550&mode=Lightning`

  The following are the hostnames for application staging and geographical locations:

    - AppStaging—`agent.ext.appstaging.ciscoccservice.com`

    - ANZ—`agent.wxcc-anz1.cisco.com`

- EU1—`agent.wxcc-eu1.cisco.com`

- EU2—`agent.wxcc-eu2.cisco.com`

- US—`agent.cjp.cisco.com`

- Softphone Height: `600`

- Softphone Width: `550`

Step 5   Click **Save**.

Assign User Permission in Cisco Webex Contact Center for Salesforce

You must assign users permission to access the Cisco Webex Contact Center for Salesforce client.

Procedure

Step 1   In Salesforce, navigate to **Setup**.

Step 2   Enter `Users` in the Quick Find and click **Users**.

Step 3   Click the **Edit** link corresponding to the user to whom you want to provide access permission.

Step 4   Search for **Call Center** parameter and in the search look up, select Webex Contact Center.

Step 5   Click **Save**.

Create a Default Softphone Layout in Cisco Webex Contact Center for Salesforce

To create a default Softphone layout:

Procedure

Step 1   In Salesforce, navigate to **Setup**.

Step 2   Enter `Softphone Layouts` in the Quick Find and click **Softphone Layouts**.

Step 3   Click **New**.

Step 4   Enter the `Name` for the layout and select the **Is Default Layout** check box.

Step 5   Select the Call Type to indicate when to launch the Smartphone layout:

- *Internal*: This option is not used.

- *Inbound*: Allows you to launch the smartphone layout for inbound calls.

- *Outbound*: Allows you to launch the smartphone layout for outgoing calls.

Step 6 Configure the **Screen Pop Settings** as per your requirement.

Step 7 Click **Save**.

Assign a Page Layout in Cisco Webex Contact Center for Salesforce

To assign a Page Layout for Cisco Webex Contact Center for Salesforce:

Procedure

Step 1 In Salesforce, navigate to **Setup**.

Step 2 Enter `Object Manager` in the Quick Find and click **Task** > **Page Layouts**.

Step 3 Click **Page Layout Assignment** > **Edit Assignment**.

Step 4 Select a profile from the displayed list in the **Profiles** column.

Step 5 Select the *Cisco Webex Contact Center Task Layout* from the **Page Layout To Use** drop-down list.

Step 6 Click **Save**.

Set up Call Recording in Cisco Webex Contact Center for Salesforce

Procedure

Step 1 In Salesforce, navigate to **Setup**.

Step 2 Enter `Custom Settings` in the Quick Find and click **Manage** on the Configuration entry and then click **New**.

Step 3 Enter the name as `TenantId` and enter your tenant ID in the value field.

Note • If you do not have the Tenent ID, reach out to Cisco Support.

• You must upgrade to the latest Salesforce connector version 1.15.

CHAPTER 3

Agent Activities in Cisco Webex Contact Center for Salesforce

Receive an Inbound Call in Cisco Webex Contact Center for Salesforce

To receive an inbound call:

Procedure

Step 1   In Salesforce, click the **App Launcher** menu and select **Webex Contact Center** App.

Step 2   Click the **Phone** button (on the bottom left) and sign in to the client.

Step 3   In the client screen, change the status to **Available** to receive calls.

Step 4   When there is an incoming call, the client finds the Automatic Number Identification (ANI) number in the record to see if the customer already exists.

     • If the record is found and screen pop is configured, then customer details are displayed in a pop-up screen.

     • If the record is not found, then a New Contact profile screen pop appears where you can enter the details.

Note   To set up the screen pop, see Create a Default Softphone Layout in Cisco Webex Contact Center for Salesforce.

Step 5   After the call is disconnected, select a wrap-up reason from the drop-down list.

An activity is logged against the respective Salesforce contact.

To see the activity log, click any entry in the Activity list. The following details appear:

Table 1: Call Activity Log

Parameter	Description
Assigned To	Shows the name of the agent who answered the call.
Subject	Shows type of the call, date, and timestamp.
Contact Type	Shows the contact type.
Ani	Shows caller's number.
Call Duration	Shows call duration in seconds.
Queue Name	Shows the queue name.
Due Date	Shows the follow-up date.
Priority	Shows the priority, such as High, Normal, or Low.
Created By	Shows the agent who has created the record.
Status	Shows the status of the call entry.
Call Object Identifier	Shows object ID used to track the call.
Call Type	Shows the call type.
Dnis	Shows the Agent's phone number.
Call Result	Shows the wrap-up option that is used, such as Follow-up, Default, or custom defined option.
Name	Shows the customer name.
Related To	Shows the related case with this activity.
Last Modified By	Shows the Agent who modified the task.
Comments	Shows Agent comments.

To play a recording, select an activity in the contact page and click **Play Recording**.

Note   If you have issues playing the recording, follow the steps in .

Place an Outbound Call in Cisco Webex Contact Center for Salesforce

To place an outbound call:

Procedure

Step 1	In Salesforce, click the **App Launcher** menu and select **Webex Contact Center**.
Step 2	Enter the contact name in the **Search Salesforce** textbox and click the contact name, and then click the phone number to dial. Or, click **Phone > Dialer** and then enter the phone number and click the phone icon to dial.
Step 3	After the call is disconnected, an activity is logged for the respective Salesforce contact.

Create a Report in Cisco Webex Contact Center for Salesforce
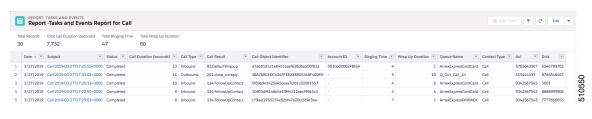
To generate a report:

Procedure

Step 1	In Salesforce, click **App Launcher** > **Webex Contact Center**.
Step 2	From the Navigation Apps drop-down, select **Reports**.
	Note If the *reports* is not listed, click **Edit > Add More Items** and add the Reports.
Step 3	To see all the existing reports, click **All Reports**.
	Note There is a default call activity report that installs with Cisco Webex Contact Center for Salesforce client. You can modify the dates, and add or remove fields and filters.
Step 4	To create a new report, click **Reports > New Report**.
Step 5	In the Report Builder tab, select the required report type and then click **Save & Run**.
Step 6	Enter the `Report Name` and click **Save**.

Cisco Webex Contact Center for Salesforce generates this report using the data that is logged in the Salesforce.

Report Parameters in Cisco Webex Contact Center for Salesforce

The following parameters are available to track in Cisco Webex Contact Center:

Parameter	Description
Date	Indicates the date when the activity got created.

Parameter	Description
Subject	Indicates the activity happened along with date and time stamp.
Status	Indicates the status of the call. It is always complete.
Call Duration (Seconds)	Indicates the duration of the call in seconds.
Call Type	Indicates if the call type is inbound or outbound.
Call Result	Indicates wrap-up reason used after the call.
Call Object Identifier	Indicates the session ID for future debugging purpose.
Account ID	Indicates the owner ID to track the customer.
Ringing Time	Indicates count of ringing duration before the call is answered.
Wrap Up Duration	Indicates the time taken to update the details after the call ended.
Queue Name	Indicates the name of the queue where call is received.
Contact Type	Indicates the medium used to communicate. Currently, only call is provided.
Ani	Indicates the ANI digits delivered with the call. ANI is a service provided by the phone company that delivers the caller's phone number along with the call.
Dnis	Indicates the Dialed Number Identification Service (DNIS) digits delivered with the call. DNIS is a service provided by the phone company that delivers a digit string indicating the number the caller dialed along with the call.