



Support Center and SupportForce.com™ Configuration Guide

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About This Guide

The *WebEx™ Support Center – SupportForce.com™ Configuration Guide* provides instructions for customizing your SupportForce.com application to allow integration with WebEx Support Center. From within your SupportForce.com application, you will be able to launch on-line support sessions and review previously held sessions.

Audience

This guide provides information for the SupportForce.com site administrator who can use SupportForce Studio customization tools to add Support Center functionality to the Case template of your SupportForce.com application. The reader should be familiar with the SupportForce.com Setup functionality and use of the Studio features to customize their Case template layout.

Obtaining assistance

For information about contacting technical support for Support Center, refer to the Support page on your Support Center Web site.

Providing feedback

WebEx Communications greatly appreciates any feedback that you provide about our products and documentation.

You can provide feedback about Support Center to WebEx Communications by sending an email message to feedback@webex.com.

Configuration Overview

The steps required to configure your SupportForce.com application to integrate with WebEx Support Center are easy to perform. There are three main activities involved in the configuration:

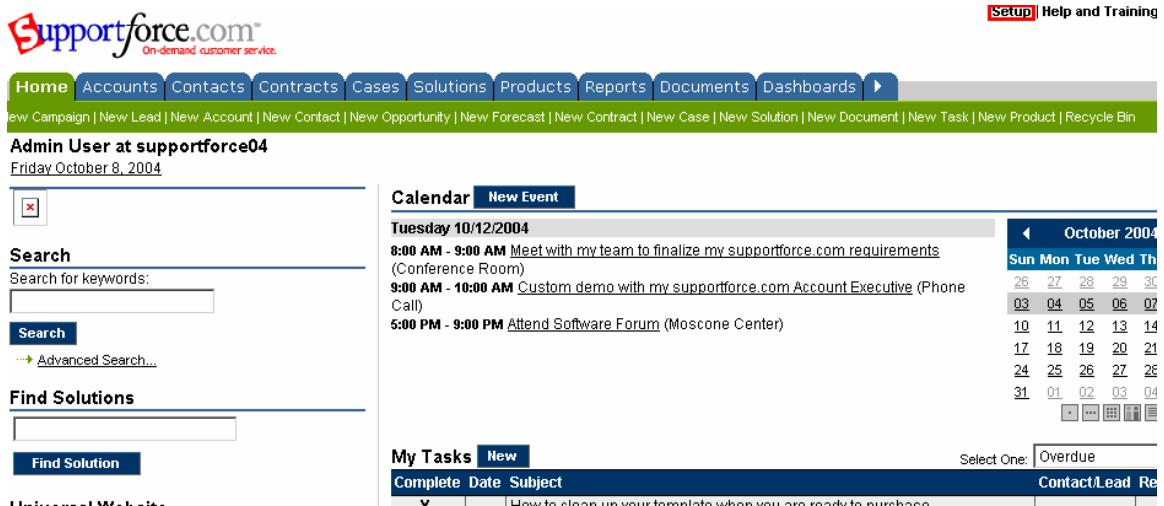
1. Creating a Web Integration Link to launch a Support Center Session
2. Modifying a Case page layout to receive the web link
3. Placing the web link on the case page

Before proceeding with the instructions in this guide, you should already have a working Support Center web site, and at least one user identity established in Support Center. This will allow you to verify the configuration after the steps are complete.

Creating a Web Integration Link

To create a Web Integration Link that will launch a Support Center session, perform the following steps:

1. Log into SupportForce.com
2. Click “Setup” at the top of the screen (highlighted in Red below).



3. Navigate to the “Studio” tab in the left navigation bar. Under Studio, select “Customize”, followed by “Cases”, and finally select “Web Links” as shown below.

The screenshot shows the Salesforce Studio interface. On the left is a navigation menu under the 'Studio' header. The menu is expanded to show 'Customize' > 'Cases' > 'Web Links', with 'Web Links' highlighted by a red box. Other items in the 'Cases' sub-menu include Fields, Page Layouts, Queues, Business Hours, Assignment Rules, Escalation Rules, Support Processes, Record Types, Support Settings, and Auto-Response Rules. Other top-level items include Tab Names, Home, Activities, Campaigns, Leads, Accounts, Contacts, Opportunities, Self-Service, Contracts, Solutions, Products, Users, Workflow, Reports, Extend, and Integrate. The main content area on the right has a blue header and contains three sections: 'Email' (Change your outgoing email settings, Create or edit an email template), 'Mobile Users' (Sync with Outlook or Palm OS, Download Offline Edition, Remove records from your Offline Edition Briefcase), 'Import' (Import your data from Outlook, ACT!, etc.), and 'Office Edition' (Install Office Edition).

4. Create a new Web Link by specifying the following values in their respective fields.

Link Properties:

- Link Label: type in “WebEx Support Session”
- Link Type: URL

Hit “Next”.

Step 1. Define Link Name and Type
Step 1 of 5

Cancel
Next

Select what type of web link to create - a link to a URL or a link to a predefined sforce control in the sforce control library.

Web Link Definition: ■ = Required Information

Link Label:

Link Type:

Cancel
Next

5. On the next screen, enter this Link URL:

```
https://supportcenter.webex.com/supportcenter/sc30/integration/sforce/login.php?AT=sforce&CaseID={!Case_ID}&SessionID={!User_Session_ID}&ServerUrl={!API_Enterprise_Server_URL_30}&today={!Today}&SC_URL=<customer SC site>
```

Replace <customer SC site> with your WebEx Support Center site for the SC_URL parameter. For example, if your WebEx Support Center site is:

```
https://abc_corp.webex.com/abc_corp
```

then the link URL will be:

```
https://supportcenter.webex.com/supportcenter/sc30/integration/sforce/login.php?AT=sforce&CaseID={!Case_ID}&SessionID={!User_Session_ID}&ServerUrl={!API_Enterprise_Server_URL_30}&today={!Today}&SC_URL=https://abc_corp.webex.com/abc_corp
```

Step 2. Define Link Contents
Step 2 of 5

Cancel
Previous
Next

Enter the web page address in the Link URL field. You can enter a simple URL just as it appears in the browser address bar, or you can use one or more merge fields to insert organization-specific data from salesforce.com into URL parameters.

Examples: Simple
 With Merge Field

Available Merge Fields

Select Field Type	Select Field	Copy Merge Field Value
<input type="text" value="Case Fields"/>	<input type="text"/>	<input type="text"/>

Copy and paste the merge field value into your template below.

Link URL:

Preview Web Link

Encoding:

Cancel
Previous
Next

6. Specify the encoding as Unicode (UTF-8). Hit “Next”.
7. On the next screen, select the page to open in a separate window as shown below, and click “Next”.

Step 3. Choose Window Open Type
Step 3 of 5

Cancel
Previous
Next

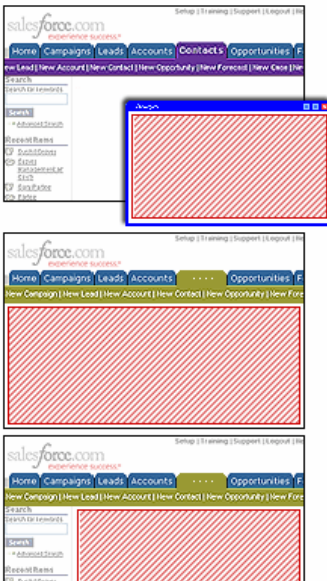
Choose how the web link's content should be displayed.

Display Properties:

Open in separate popup window

Open in salesforce.com window without sidebar

Open in salesforce.com window with sidebar



8. Accept the default values and click “Next”.
9. Click “Save” to create the new Support Center web integration link.

Step 5. Confirm Web Link Settings
Step 5 of 5

Save
Cancel
Previous

Confirm the web link settings before saving.

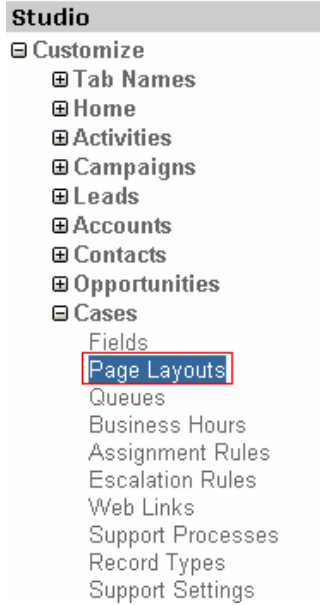
Link Label: Webex Support Session	Link Encoding: Unicode (UTF-8)
Window Type: Open in separate popup window	
Link URL: https://supportcenter.webex.com/supportcenter/sc30/integration/sforce/login.php?AT=sforce&CaseID={Case_ID}&SessionID={User_Session_ID}&ServerUrl={API_Enterprise_Server_URL_30}&today={Today}&SC_URL=https://eess1.webex.com/eess1	
Height (in pixels): 600	Show Address Bar:
Width (in pixels):	Show Scrollbars: <input checked="" type="checkbox"/>
Window Position: No Preference	Show Toolbars:
Resizable: <input checked="" type="checkbox"/>	Show Menu Bar:
	Show Status Bar:

Save
Cancel
Previous

Customizing the Case Page Layout

The next phase of the configuration is to customize the Case Page where the web link will appear. Follow these steps:

1. Navigate to the Studio tab in the left navigation bar, and select “Customize”, followed by “Cases”, and finally “Page Layouts”.



2. From the list of Case Page Layouts, select the “Edit” function (highlighted in red below) for the case layout in which you want to place the “WebEx Support Session” web link. If you want to place the link on multiple layouts, simply repeat these steps for each layout.

Case Page Layout [? Help](#)

This page allows you to create different page layouts to display Case data. You can then control which page layout users see by default from the Profile setup pages.

Case Page Layouts New Page Layout Assignment

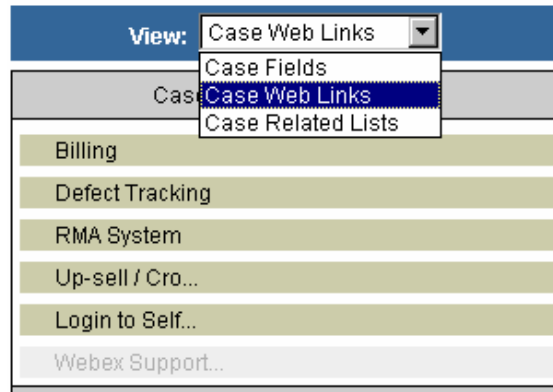
Action	Page Layout Name	Created By	Modified By
Edit Del	Case Layout	Admin User, 10/8/2004 8:30 AM	Admin User, 10/8/2004 2:20 PM

Case Close Page Layouts New Page Layout Assignment

Action	Page Layout Name	Created By	Modified By
Edit Del	Close Case Layout	Admin User, 10/8/2004 8:30 AM	Admin User, 10/8/2004 8:30 AM

3. Once you click Edit, you will land in the “Edit Page Layout” screen. On the right hand side of this screen you will notice a drop

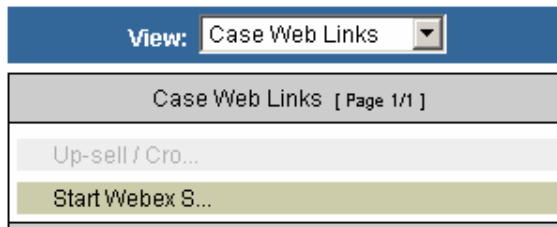
down box with the label “View”. Select the option “Case Web Links” from the drop down box.



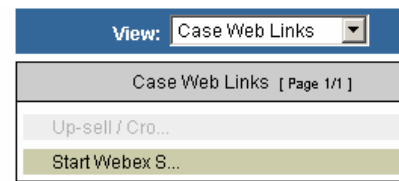
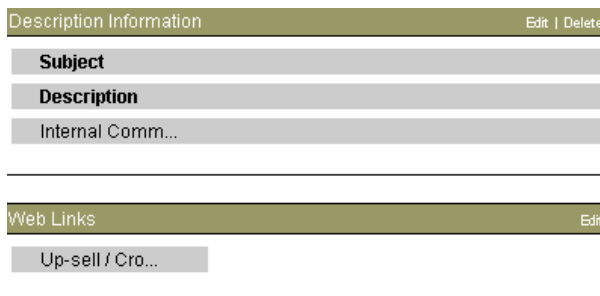
4. Upon selecting Case Web Links, the new Case web integration link “WebEx Support Session” will show up in the list of web links.

Placing the Web Link

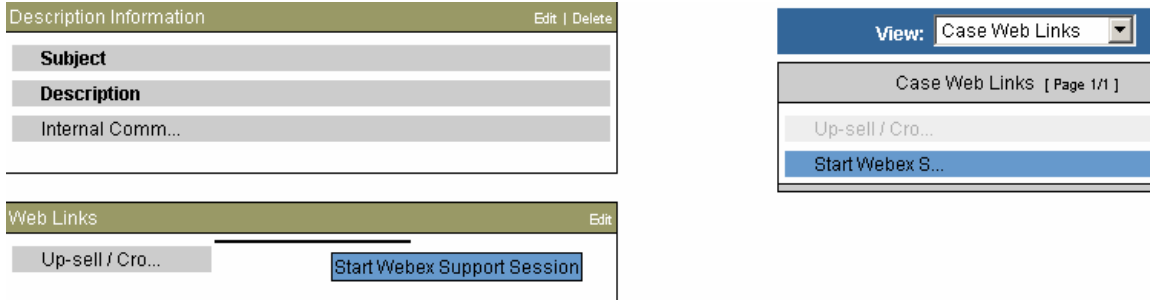
The last phase of the configuration is to place the “Start WebEx Support Session” link on the Case page lay out.



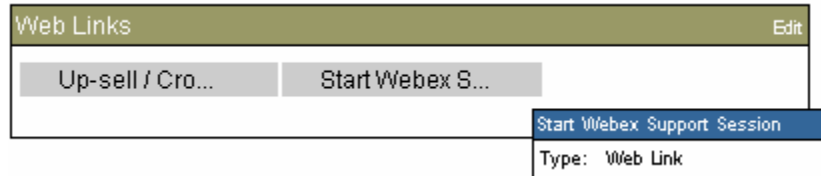
1. Now that you have selected “Case Web Links” above in step #4, scroll down the page until you reach the “Web Links” section.



- Once you reach this section, drag and drop the “Start WebEx Support session” link into Web Links section of the layout. You should see the link appear as shown below.



Once the link is placed in the Web Links area, it should look like the screen below.



- Once you are done with the above steps, scroll back up to the top of the page and click “Save” to save the updated layout.
- Setup is now complete!

Verifying Your Configuration

To verify your new Web Integration Link is operating properly, perform the following steps. Note, you must have a valid user login and password on the WebEx Support Center site for this operation.

- Go to the Case page where you placed the web link. Select any of the cases that exist and you should notice a “WebEx Support Session” link enabled.
- Click “WebEx Support Session”, and when prompted, enter your WebEx username and password. Click “Submit”.
- A new browser window will open, and the WebEx Support Session should be launched.
- When you end the Support Session, there should be an entry registered under the Activity History section of the case.