webex
by CISCO

Salesforce integration

Extending Webex to where sales and service professionals work

Now you can use Webex right inside Salesforce. No more cumbersome workflows, hopping between apps, and scattering customer data across platforms. It's easy to call, message, and meet directly from within a Salesforce record.

Collaboration

Access
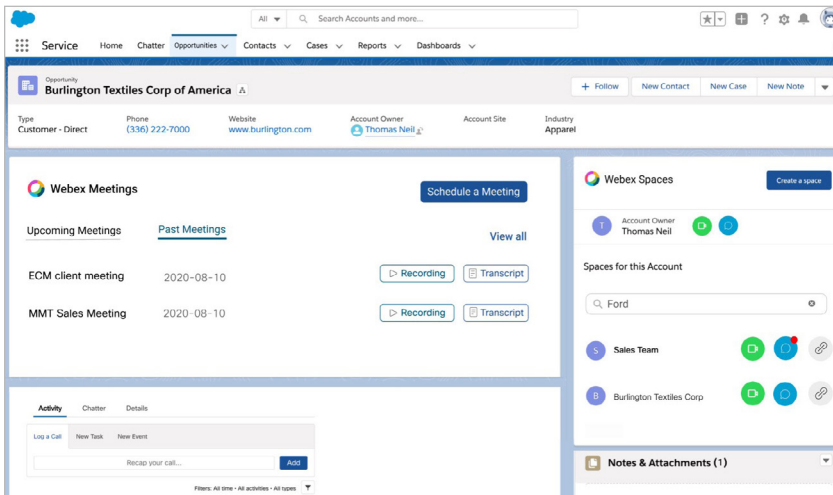
Customization

Efficiency

Challenges:

- Collaborating on CRM records requires constant context switches

- Jumping between apps for collaboration leads to cumbersome workflows and a frustrating user experience

- Vital customer data is scattered across various tools like chat sessions and meeting recordings

Solution:

Salesforce integration puts Webex where sales and service professionals work:

- Enable seamless collaboration within Salesforce, minimizing context switches

- Tie Webex Meetings, Messaging, and Calling to Salesforce records, providing access to opportunities, leads, custom objects, and more

- Use Webex App with widgets to customize layouts based on business needs and user roles

Connecting workflows with Webex lets you focus on your work, not your tools.

The Webex and Salesforce integration removes application boundaries, brings people together to collaborate, and empowers you to Webex where you work.

We simplify your life and increase efficiency by bringing Webex services to the tools you use most.

Meetings widget

- Schedule meetings with the team associated to a Salesforce object
- Join meetings
- Play recordings of past meetings
- View transcripts of past meetings

Message widget

- Create and manage spaces
- Support in-place messaging
- Attach content to messages
- Access previous space content

Call widget

- Call number associated to record by cross launching the Webex Calling app
- Dial number and cross launch the Webex Calling app

How to get started

1. Go to Webex App Hub

2. Search "Salesforce"

3. Follow the instructions to download and install the app

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Please visit webex.com

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