

# Salesforce Integration

Extending Cisco Webex to Where Sales and Service Professionals Work



Collaboration



Access



Customization



Efficiency

Now you can use Cisco 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.

## 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

## Meetings Widget

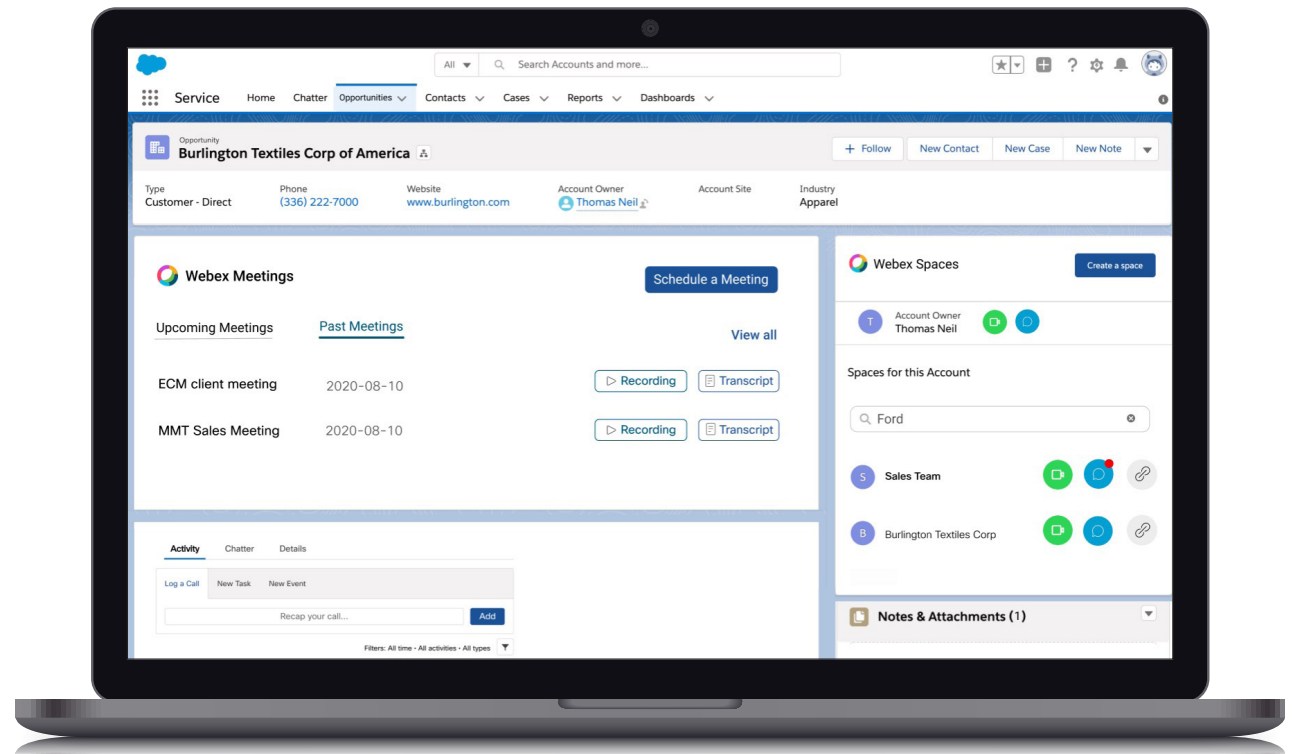
- Schedule meetings with the team associated to a Salesforce object
- Join meetings
- Play recordings of past meetings
- View transcripts of past meetings

## 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



## 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.

## How to get started

1. Go to [Cisco Webex App Hub](#)
2. Search “Salesforce”
3. Follow the instructions to download and install the app