Virtual Office for Salesforce Integration: Customize Call Logs in Lightning

Overview

These instructions will guide you through implementing customized call logs for the 8x8 Virtual Office for Salesforce integration in Salesforce Lightning mode.

Instructions for performing this setup can be made in Salesforce Classic mode as well:

- Virtual Office for Salesforce Integration: Customize Call Logs

Customizing your 8x8 Salesforce integration call logs requires a few primary steps, in the following order:

- Verify Pre-Requisites for Customizing Call Logs
- Add New Custom Activity Fields
- Edit the Task Layout
- Edit the Call Center Call Log Custom Field Mapping
- Final step for your Salesforce users to perform

Verify Pre-Requisites for Customizing Call Logs

Verify that the following pre-requisites are met, and then continue with the configuration.

1. Log in to Salesforce Lightning mode as an administrator.
2. From the Setup icon
   - click on Setup.
3. Search for and click on Installed Packages.
4. Verify that the installed 8x8 Virtual Office for Salesforce package is version 2.8.
5. Then from Setup again, search for and click on Call Centers.

6. Verify that your call center is named 8x8 Virtual Office Integration - Next Generation_Lightning or 8x8 Virtual Office Integration - Next Generation With Lightning.

7. If either the Package version or the Call Center do not meet the above requirements, navigate to the following article and follow the instructions there to fix either or both of those issues:
   - Virtual Office for Salesforce Integration: v 2.x Full Installation

8. Proceed to the next step to begin customizing your call logs.

Add New Custom Activity Fields

The next step is to create custom Activity fields that will apply specific call data to your Salesforce user call records.

**Note:** ALL of the following custom fields are required to be created and enabled for any of them to work.

Also note that only the custom fields listed below, and the Call Recording URL field, are available. No other custom fields may be added to or created for this integration.

<table>
<thead>
<tr>
<th>Custom Field</th>
<th>Data Type</th>
<th>Field Name</th>
<th>API Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Start Time</td>
<td>Date/Time</td>
<td>Call_Start_Time</td>
<td>Call_Start_Time__c</td>
</tr>
<tr>
<td>Call End Time</td>
<td>Date/Time</td>
<td>Call_End_Time</td>
<td>Call_End_Time__c</td>
</tr>
<tr>
<td>Extension</td>
<td>Text</td>
<td>Extension</td>
<td>Extension__c</td>
</tr>
</tbody>
</table>
1. From the **Setup** icon

![](https://support.8x8.com/us/cloud-phone-service/voice-integrations/salesforce/Virtual_Office_for_Salesforce_Integration%3A_…)

2. From **Setup**, search for and click on **Object Manager**.
3. Click on **Activity**.

![](https://support.8x8.com/us/cloud-phone-service/voice-integrations/salesforce/Virtual_Office_for_Salesforce_Integration%3A_…)

4. Click on **Fields & Relationships**.

5. At the top-right of the **Fields & Relationships** page, click **New**. This will take you to the **New Custom Field** page.
You'll need to repeat the following steps for each of the five custom fields noted in the table above. In the example below, we'll walk through adding the Call Start Time field.

6. Select the **Data Type** for the custom field you are adding, and click on **Next**.

7. Enter the **Custom Field** name from the table above into the **Field Label** area and press the `<tab>` key on your keyboard. The **Field Name** should automatically populate.

8. Click **Next**.

9. Select the **Field Level Security** for your user profiles to make the field visible to your users, as needed.
   - **Note: Read Only** will prevent call data from being written to the associated field.

10. Click **Next**.
11. Verify your information. Because 8x8 call data is stored into a Task, be sure to leave the Task Layout box checked.

12. Click Save & New to begin creating the next custom field.

13. Repeat steps 6 through 12, referring to the Custom Field table above for configuration info about the four other custom fields you must create.

14. Some notes to consider about configuration:
   - **Extension**: When configuring the Extension custom field, the Length variable should be at least as many digits as your phone extensions require. Recommended value is 8.
   - **Call Outcome**: When configuring the Call Outcome custom field, select the option Enter values, with each value separated by a new line, and add your custom outcome codes. The text you enter here will appear as a selection in the 8x8 communication panel when dispositioning a call.
Global Picklists: Global picklists are supported. Select Use global picklist value set as your Values option, then select the desired picklist from the dropdown.

- Global picklists are created in Setup > Objects and Fields > Picklist Value Sets.

15. When you reach step 12 above for the last of the five custom fields, click Save instead of Save & New.

16. The Activity > Details page will appear with a brief summary. From there, click on Fields & Relationships to verify the new Task fields you've created.

- Note that the FIELD NAME column entries below are automatically applied to each of your custom fields. These will be used during the final configuration step, when editing the 8x8 call center.
- If needed, you can find and edit these custom fields later in Setup > Objects and Fields > Object Manager > Activity > Fields & Relationships.

17. Continue with the next section, Edit the Task Layout.
Edit the Task Layout

The 8x8 Virtual Office for Salesforce integration stores call records in Salesforce Tasks when a call is dispositioned.

Now that the custom Activity fields are added, you can arrange those fields in the Task pane if desired, so that the applied call data can be displayed to your needs.

1. From Setup, search for and click on Object Manager.
2. Click on Task.
3. Select Page Layouts and click Task Layout.
4. Verify that the custom fields you've created are added to the Task Layout page. You can add or re-arrange them as needed.
5. Click Save if you make any changes.
Edit the Call Center Call Log Custom Field Mapping

The final step in this process is to enable and configure custom call logging in the 8x8 call center.

1. From Setup

   ![Setup icon]

   , search for and click on Call Centers.

2. Click Edit to make changes to the call center 8x8 Virtual Office Integration - Next Generation With Lightning.

   ![Call Centers screen]

3. In the Other Options > Call Log Custom Fields Enabled field, enter true in lower case.
4. Scroll down to **Call Log Custom Field Mapping**.

5. Change the value in each field (except Call Recording URL) to match to the new custom fields you created.

**Note**: At this time do not alter the **Call Recording URL** field. Enabling that feature is a separate process covered in the following article:

- [Virtual Office for Salesforce Integration: Configure the Call Recording URL Field in Lightning](https://support.8x8.com/us/cloud-phone-service/voice-integrations/salesforce/Virtual_Office_for_Salesforce_Integration%3A__)

6. For comparison, use a different browser tab to navigate to **Setup > Objects and Fields > Object Manager > Activity > Fields & Relationships**. The entries in the FIELD NAME column must **exactly** match your call center **Call Log Custom Field Mapping** entries.
7. Verify that your changes are correct, then click **Save** at the bottom of your call center.

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**Final step for your Salesforce users to perform:**

1. Your Salesforce users should click their Salesforce **Home** tab and log in to their 8x8 communication panel.
   - If users were logged in to the 8x8 communication panel during your configuration process, they should log out and then back in.
2. Each user must click **Menu** then **Settings** to configure their personal settings.
3. In the **Call Outcome Source** section at the bottom of **Settings**, the **Salesforce** slider must be enabled.

4. Click **Save and Close**.
This completes the process of customizing your call log.

It's recommended that you test this functionality to make sure that it works properly. If any of the above settings were not applied correctly, the entries will either not appear, or you will receive errors when dispositioning a call and your call log cannot be saved. In that case, you should run through the above documentation again to resolve the issue.

**Suggestion:** If custom outcomes do not appear for an agent when dispositioning a call, try disabling the **Call Outcome Source**

- then Save and Close, then re-enable it

- and Save and Close again. Then refresh the Salesforce page for good measure.