



Getting Started with Cisco Webex Contact Center for Microsoft Dynamics 365

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Change History

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

Change	See	Date
This topic is updated.	Configuration of Channel Integration Framework for Microsoft Dynamics 365, on page 3	June 2020
Initial Release of Document		July 2019

About this Guide

This guide explains how Microsoft Dynamics 365 users can use the Cisco Webex Contact Center for Microsoft Dynamics 365 connector to handle incoming and outgoing customer calls. It describes how the Cisco's Webex Contact Center for Microsoft Dynamics 365 features can be configured to meet the organization's contact center needs. These features can be accessed through a combination of native Dynamics user interfaces and custom canvas user interfaces.

Audience

This document is intended for Microsoft Dynamics 365 users with administrative privileges who manages the contact centers and for agents who support end customers.

Conventions

This manual uses the following conventions:

Convention	Description
boldface font	<p>Boldface font is used to indicate commands, such as user entries, keys, buttons, and folder and submenu names. For example:</p> <ul style="list-style-type: none"> • Choose Edit > Find • Click Finish.
<i>italic</i> font	<p>Italic font is used to indicate the following:</p> <ul style="list-style-type: none"> • To introduce a new term. Example: A <i>skill group</i> is a collection of agents who share similar skills. • For emphasis. Example: <i>Do not</i> use the numerical naming convention. • An argument for which you must supply values. Example: IF (<i>condition, true-value, false-value</i>) • A book title. Example: See the <i>Cisco Webex Contact Center Getting Started Guide</i>.
window font	<p>Window font, such as Courier, is used for the following:</p> <ul style="list-style-type: none"> • Text as it appears in code or information that the system displays. Example: <code><html><title> Cisco Systems, Inc. </title></html></code> • File names. Example: <code>tserver.properties</code> • Directory paths. Example: <code>C:\Program Files\Adobe</code>

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CHAPTER 1

Get Started with Cisco Webex Contact Center for Microsoft Dynamics 365

Cisco Webex Contact Center brings the power of Cisco's cloud contact center into your Microsoft Dynamics 365. Cisco Webex Contact Center helps to and enhance your digital experience and enable you to deliver contextual, continuous, and capability-rich journeys for your customers with holistic reporting.

This guide explains how you can install, configure, and use the different features of Cisco Webex Contact Center for Microsoft Dynamics 365.

- [Features Supported in Webex Contact Centre for Microsoft Dynamics 365, on page 1](#)
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Features Supported in Webex Contact Centre for Microsoft Dynamics 365

- End-to-End call control from the Customer Relationship Manager (CRM) desktop.
- Automatic screen-pop for inbound and outbound calls.
- Call activity logging in the CRM desktop including wrap-up data.
- Ability to click to dial with agent ANI masking.
- Default activity report.

Installation of Cisco Webex Contact Center for Microsoft Dynamics 365

Before you begin

You must install the Channel Integration Framework (CIF) application in your system before installing Microsoft Dynamics 365. For information on how to install CIF, see <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/channel-integration-framework/get-channel-integration-framework>.

Procedure

- Step 1** Sign in to Microsoft Dynamics 365.
- Step 2** Check if the Channel Integration Framework App appears on the Home page. This App is used while installing Cisco Webex Contact Center.
- Step 3** From the Home page, click **Menu > Get more apps**.
- Step 4** You find the **Cisco Webex Contact Center** App either by searching in the Marketplace or by going to **Menu > Collaboration**.
- Step 5** On the **Cisco Webex Contact Center for Microsoft Dynamics** App, click the **Get it now** button and click the **Continue** button to accept the agreement.
- Step 6** In the **Add the application to Dynamics 365** page, accept Legal Terms and Privacy Statement and click **Agree**.

The installation will take sometime to complete.

What to do next

To verify the installation, from the top-right navigation bar, click the **Gear** icon and then click **Advance Settings** and follow either one of the option:

- From the **Settings** drop-down, click **Solutions** under the Customization category and then click **Cisco Webex Contact Center for Microsoft Dynamics**.

You can see that the list of files are added.

- From the **Settings** drop-down, click **Solutions History** under the Customization category and then click **Cisco Webex Contact Center for Microsoft Dynamics**.

You can see the installation result on the status column.

Configuration of Channel Integration Framework for Microsoft Dynamics 365

To use the unified platform of Cisco Webex Contact Center you have to configure it within Microsoft Dynamics 365.

Procedure

-
- Step 1** In the **Dynamics 365** home page, from the **Dynamics 365** drop-down, click **Channel Integration Framework**. The **Active Channel Providers** page appears. The page lists the pre-configured Webex Contact Center Channel, if any.
- Step 2** Click the instance of the configured Webex Contact Center channel, if any. The **CHANNEL PROVIDER Webex Contact Center** page appears.
- Step 3** Click the **Delete** icon, and confirm the delete. The **Active Channel Providers** page without any channel providers, appears.
- Step 4** Click **New** and enter the following information:

Note Ensure to use the same values mentioned in the following list. Fields that are not specified in this list should be left blank.

- **Name:** Cisco Webex Contact Center
- **Label:** Cisco Webex Contact Center
- **Channel URL:** *https://<your dynamics crm instance hostname>/WebResources/cjp_crmAgent*.
For example: *https://treee.crm8.dynamics.com/WebResources/cjp_crmAgent*
- **Enable Outbound Communication:** Yes
- **Channel Order:** 1
- **API Version:** 1.0
- **Custom Parameters:** {"AgentDesktopHostUrl":"https://agent.cjp.cisco.com"}

Note In the Webex Contact Center R10 version, Custom Parameter value is blank.

In the Webex Contact Center 1.0 (Abilene) version, Custom Parameter values is changed based on the region:

- **US (ProdUS1)**—{"AgentDesktopHostUrl":"https://agent.cjp.cisco.com"}
- **UK (ProdEU1)**—{"AgentDesktopHostUrl":"https://agent.wxcc-eu1.cisco.com"}
- **EU (ProdEU2)**—{"AgentDesktopHostUrl":"https://agent.wxcc-eu2.cisco.com"}
- **ANZ (ProdANZ1)**—{"AgentDesktopHostUrl":"https://agent.wxcc-anz1.cisco.com"}

- Step 5** From the **Select Unified Interface Apps for the Channel** drop-down list, select **Customer Service Hub** checkbox.

Note Connector application supports only Unified Interface Apps.

- Step 6** From the **Select the Roles for the Channel** drop-down list, select the appropriate role.
- Step 7** Click **Save**.
The **Webex Contact Center** page appears.
- Step 8** Click the URL in the **Channel URL** field to validate the configuration.
-

Manage Incoming Calls using Cisco Webex Contact Center for Microsoft Dynamics 365

You can use the Cisco Webex Contact Center for Microsoft Dynamics 365 application to manage inbound voice interaction with your customers. The application also allows you to save the call details and generate reports based on the details.

Procedure

- Step 1** In the **Microsoft Dynamic 365** home page, from the **Microsoft Dynamic 365** drop-down, select the **Customer Service Hub** application.
- Step 2** Log in to the **Customer Journey Platform Agent Desktop** application.
- Step 3** On the **Agent Desktop** page, change the status to **Available** to receive calls.

When a call is received, the system looks up the ANI (Automatic Number Identification) number records to associate the incoming call number with a contact. Depending on the search results, it does the following:

- If a single record is found, the customer contact information like the contact entity record and the phone call activity record is displayed.

After you connect with the caller, the system prompts you if you want to open the phone call activity record of the caller and view the details.

- If no records are found, then the default search page is displayed for you to search the contact. In this case, the system does not automatically tag the phone call activity record with any contact.

After you connect with the caller, the system prompts you to check if you want to tag the activity record to any contact. You can tag the activity record to contact if you are in a **Connected** state.

- If multiple records are found, then the default search page is displayed with the contact list. You can search for the appropriate contact. In this case, the system does not automatically tag the phone call activity record with any contact.

After you connect with the caller, the system prompts you to check if you want to tag the activity record to any contact. You can tag the activity record to contact if you are in a **Connected** state.

Note If the call is not answered, then the Agent Desktop automatically sets your status to **Idle** and the corresponding phone call activity record is updated with the call outcome as **Agent Not Responded**.

- Step 4** After the call is disconnected, select a wrap-up reason from the drop-down list.

An activity is logged against the respective contact. To see the activity log, click any entry in the Activity list.

See [Reports in Cisco Webex Contact Centre for Microsoft Dynamics 365, on page 5](#) for more details on the activity log.

Manage Outgoing Calls Using Cisco Webex Contact Center for Microsoft Dynamics 365

You can use the Cisco Webex Contact Center for Microsoft Dynamics 365 application to manage outbound voice interaction with your customers.

Before you begin

You should be logged in to the Customer Journey Platform Agent Desktop application to receive a call.

Procedure

- Step 1** In the **Microsoft Dynamic 365** home page, from the **Microsoft Dynamic 365** drop-down, select the **Customer Service Hub** application.
 - Step 2** Click contact from the left navigation panel.
A list of all the contacts appear.
 - Step 3** Select the contact you want to call.
 - Step 4** Click the dialer icon in the **Mobile Phone** or the **Business Phone** field.
The call is placed to the customer and the agent's status is changed to **Idle**.
 - Step 5** After the call is disconnected, an activity is logged in to the respective contact record.
-

Reports in Cisco Webex Contact Centre for Microsoft Dynamics 365

The Cisco Webex Contact Center Connector Application captures the following data and stores it in CRM to generate a report with the following details:

Parameter	Description
Activity DateTime	This indicates the date and time of the call activity.
Call From	This indicates the name of the call originating telephone.
Call To	This indicates the agent who receives the call.
Call Type	This indicates if it is an inbound call or outbound call.

Parameter	Description
ANI/Phone Number	This indicates the Automatic Number Identification (ANI) associated with the incoming call. ANI is the service provided by the phone company that delivers the caller's phone number along with the call.
DNIS	This indicates the Dialed Number Identification Service (DNIS) associated with the incoming call. DNIS is the service provided by the phone company that delivers a digit string indicating the phone number the caller dialed along with the call.
Queue Name	This indicates the name of the queue associated with the call.
Talk Time	This indicates the total duration of the call.
Call Outcome	This indicates the disposition of the call.

You can also apply the available filters and generate a customized report as per your requirement.