Amazon Connect Adapter for Dynamics

User Guide

Revision: 2018-06-04

Overview

The **Amazon Connect Adapter for Dynamics** (the Adapter) is a free add-on to Microsoft Dynamics 365 provided by Perficient and distributed on Microsoft's AppSource marketplace at {link}. This guide covers how to install, configure, and use the Adapter.

The latest version of this guide is maintained at **https://perficient-acac-webapp-prod.azurewebsites.net/support/home**.

Features

- Handle Amazon Connect calls from within Dynamics using an embedded softphone
- Display a screen pop of a related object when a call is answered
- Integrated with the **Amazon Connect Toolkit for Dynamics 365 by Perficient** to enable account look up by phone number in contact flows and screen pop

System Requirements

- Dynamics 365 online, version 9.0+
  - The Adapter does not work with the Customer Service Hub or Sales Hub apps
- Amazon Connect
- Chrome or Firefox browser (Amazon Connect requires these browsers for the softphone)

Install and Configuration

1. Install from AppSource

Pre-requisites

Before beginning this section, ensure you logged into Microsoft Dynamics 365 as user in the **System Administrator** role

The Adapter is listed in Microsoft's AppSource marketplace at {link}. Click **Get It Now** to initiate the install. After you populate the contact information form and select your Dynamics instance, the Adapter is installed.

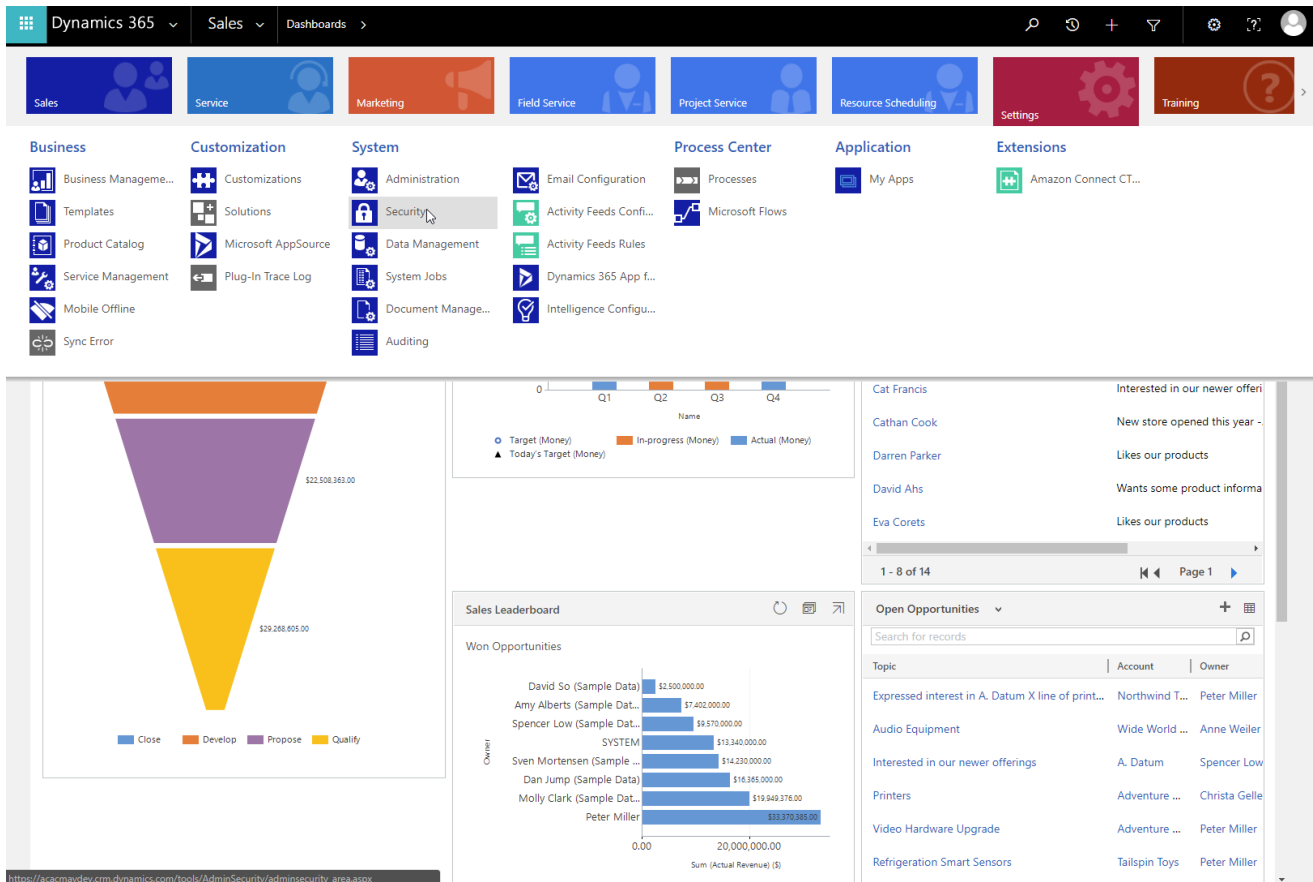## 2. Assign an Adapter Admin in Dynamics 365

Pre-requisites

Before beginning this section, ensure you logged into Microsoft Dynamics 365 as user in the **System Administrator** role

Assign an Adapter Admin

Follow the steps below to create an Adapter admin by assigning a Dynamics user to the **Amazon Connect CTI Admin** security role.

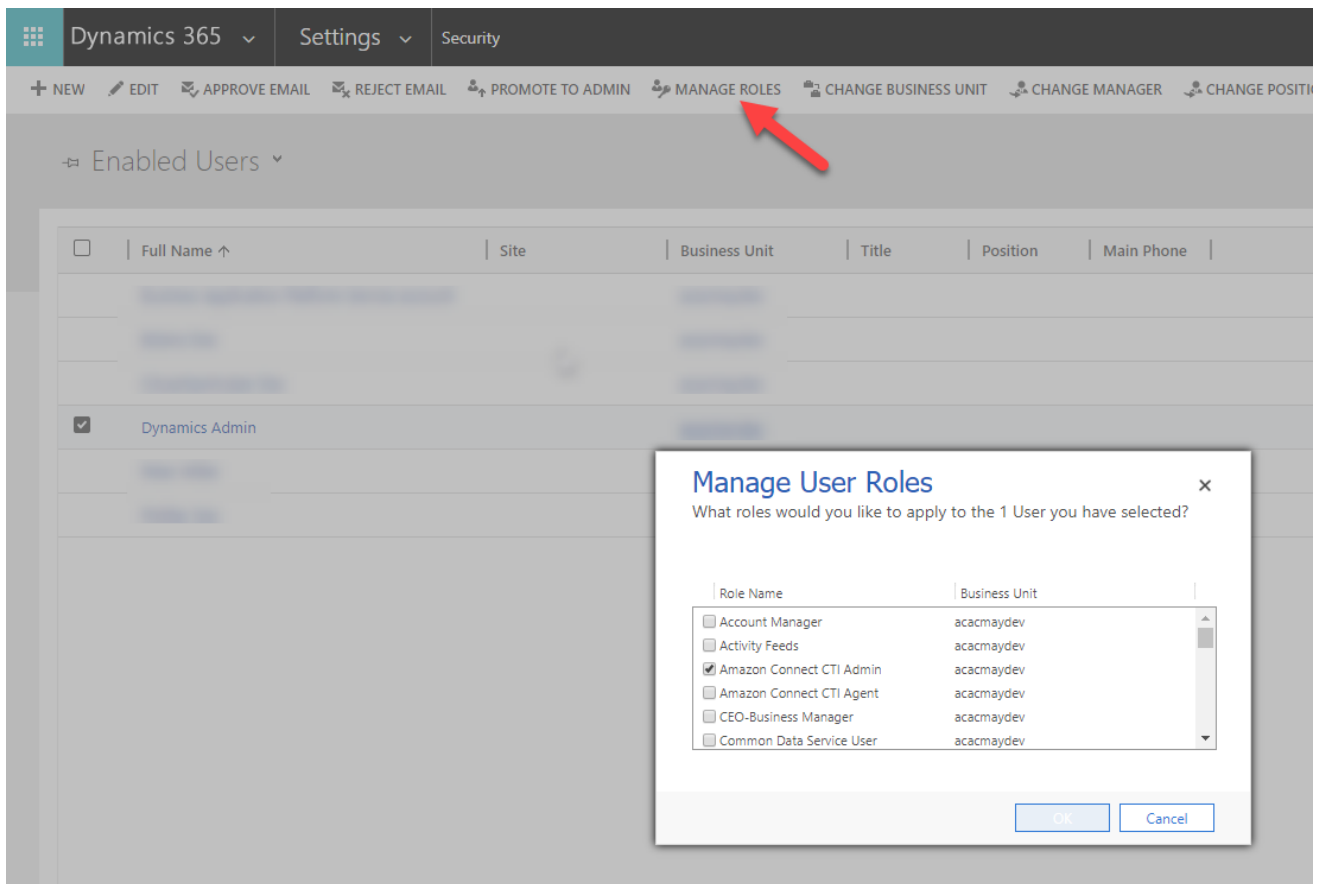Log in to your Dynamics instance and navigate to the Security Settings page.

From the Security Settings page, click **Users** to open the Users editor.

Select **User**, and click **Manage Roles**. Select **Amazon Connect CTI Admin** and click **OK.**

3. Configure Adapter and Obtain License Key

Pre-requisites

Before beginning this section, ensure you logged into Microsoft Dynamics 365 as user in the **System Administrator** role

In Dynamics 365

Follow the steps below to create an Amazon Connect CTI Settings object, populate some configuration details and sign up for a license key.

Log in to your Dynamics instance and navigate to **Settings > Extensions > Amazon Connect CTI Settings**.
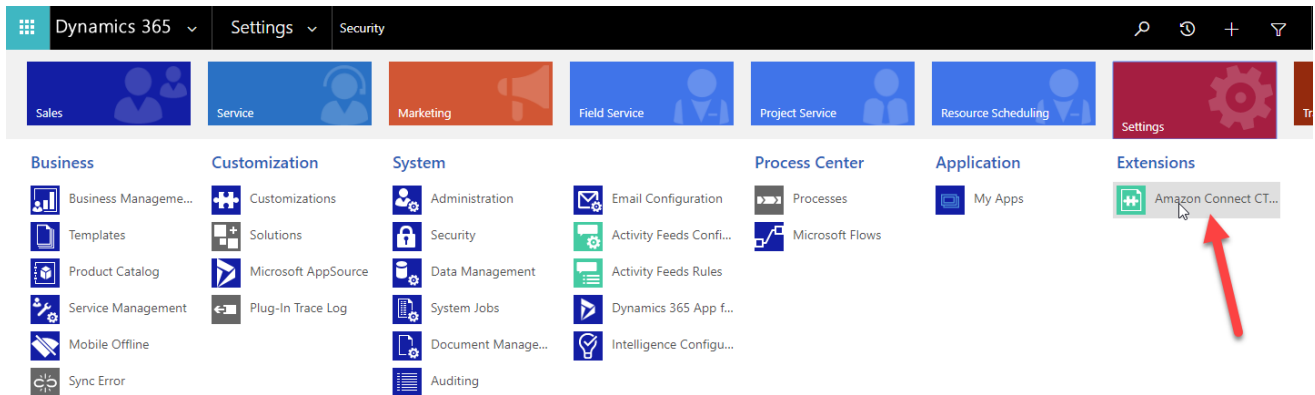
Click **+ New** to create an Amazon Connect CTI Settings object. In the resulting editor, click **Sign Up** to open a new window to the **Amazon Connect Adapter for Dynamics Administration Site** (admin site).


The admin site manages initial setup and subscription details. It also serves the necessary content to your Dynamics 365 instance to integrate with Amazon Connect.

In Admin Site

The admin site works with your existing Microsoft Azure/Dynamics 365 instance to authorize you as a contact/user for a subscription. When you first navigate to the admin site, you are redirected to the standard Microsoft Azure single sign-on process hosted at **login.microsoftonline.com**. Use your organization credentials to authenticate using your own Microsoft Azure/Dynamics 365 instance.
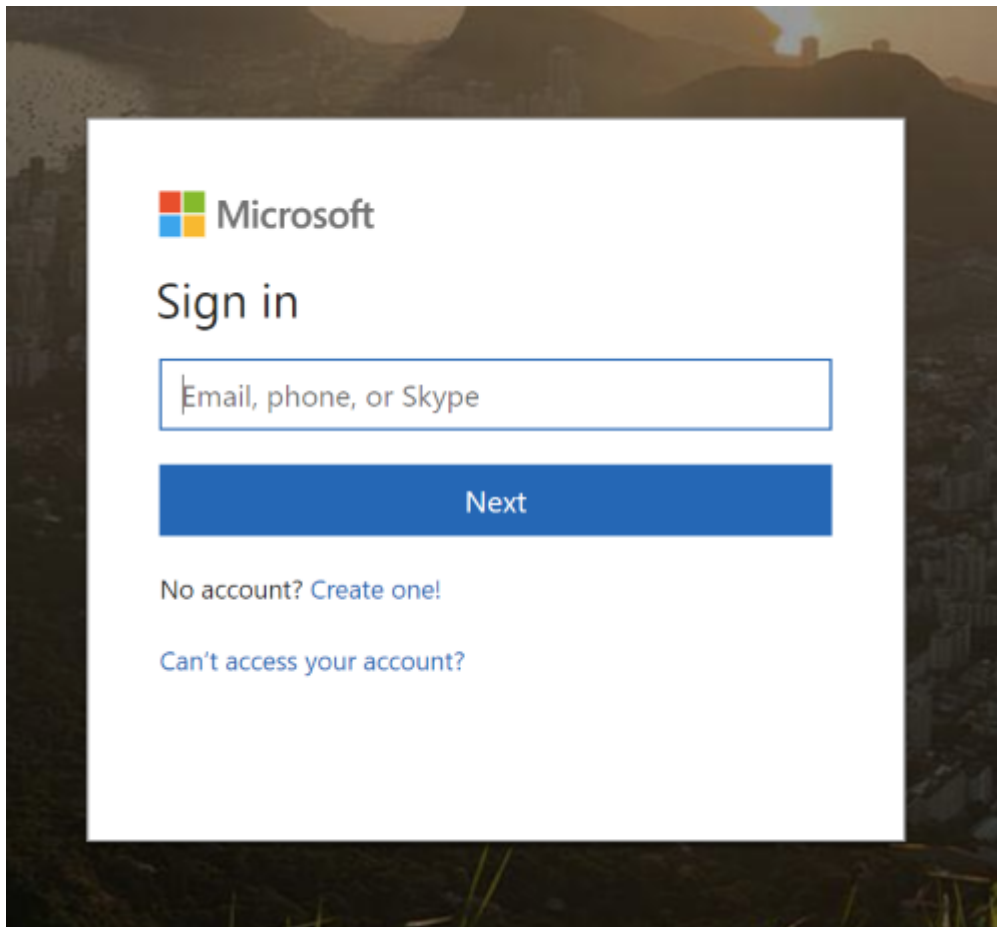
The first time you are authorized as a user, you are prompted to allow the **Sign you in and read your profile** right with our application. This provides the minimum amount of information required to authorize your usage of our site.
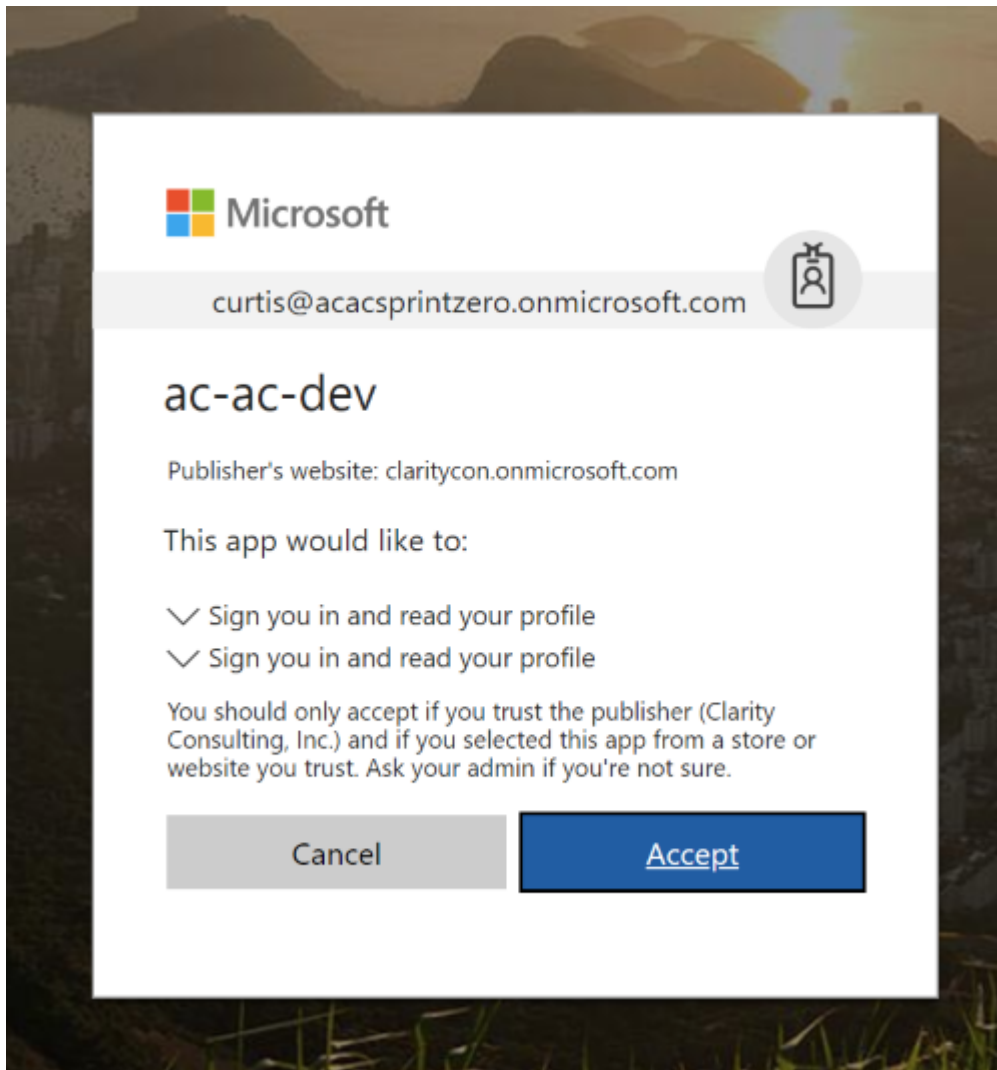
A token/authentication context is then provided to our admin site. Your password is not shared with us. We collect the unique identifier for your organization and use this in our subscription system.

Once an active subscription is established for your organization, viewing or editing subscription information is only accessible to someone from your organization. You must provide your valid license key to view or edit subscription information. You must be authenticated as a user of your organization each time you visit the admin site.

Sign Up Page

After you log in to the admin site, you are directed to the Sign Up page.

Signup

General

Company Name

Contact First Name

Contact Last Name

Contact Email Address

Contact Phone Country Code
Example: 1
+

Contact Phone Number
Example: (888) 555-0100

Settings

Amazon Connect Control Panel Url

Dynamics365 Organization Url

Terms of Service

Please review our Terms of Service by clicking the link below. You must accept the Terms of Service using the checkbox to complete the signup process.

Review Terms of Service

Generic Terms and Conditions Template

☐ Accept

Create

The sign up process requires basic contact details as well as two configuration URLs that allow us to establish integration between your Dynamics 365 instance and your Amazon Connect instance.
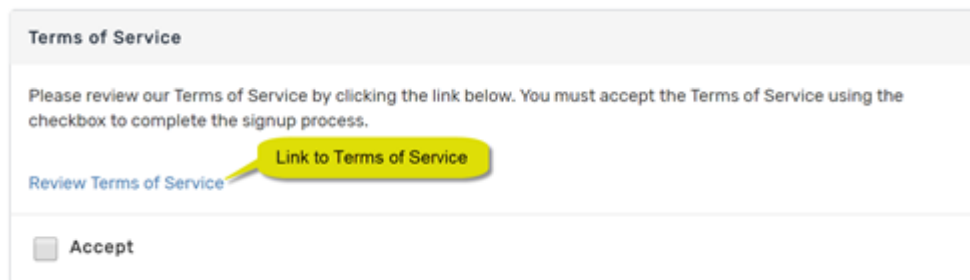
Required contact information

- Company Name

- Contact Name (First and Last)
- Contact Email
- Contact Phone Country Code
- Contact Phone Number

Required settings information

- **Amazon Connect Control Panel Url** is the full web address for your Amazon Connect instance, starting with https. A valid example typically looks like: **https://{yourinstancename}.awsapps.com/connect/ccp#/**.

- **Dynamics 365 Organization Url** is the full web address for your Dynamics 365 instance, starting with https, ending with /org. A valid example typically looks like: **https://{yourinstancename}.crm.dynamics.com/org**

You must accept our Terms of Service to continue. A link to the Terms of Service is provided.

Any missing or invalid information results in a failed submission as well as one or more error messages indicating the issue(s).

- Contact Email Address is required.
- Amazon Connect Control Panel Url is required.
- Dynamics365 Organization Url is required.
- You must accept the Terms of Service to complete subscription signup.

General

Company Name

The Company Inc.

Contact First Name

IT

Contact Last Name

Manager

Contact Email Address

After your subscription is created, you are directed to a Settings view containing your subscription details.

If there are issues with your subscription creation, we attempt to identify the issue and provide instructions to fix the problem so you can try again. If there are issues with our subscription services at the time you attempt to sign up, we log the issues and provide some context for you to contact us for additional support if needed.

If another user from your organization (same Azure AD Tenant) attempts to sign up, they are redirected to a modified settings page. This page shows that your organization is subscribed, but it does not display the settings or license key. After signup, you must have the license key to view the full details of your subscription.

The subscription settings screen displays your **License Key** (subscription ID), **Subscription Tier**, the **Subscription Start Date** and **Subscription End Date**, and your current settings.

NOTE: Your organization subscription will automatically renew for as long as you wish to use the product. The End Date represents only the currently active subscription time period.

Copy the **License Key** value before returning to your Dynamics 365 window and the Amazon Connect CTI Settings editor.

In Dynamics 365

In the Amazon Connect CTI Settings editor, change **Amazon Connect CTI Enabled** to **Yes**, and copy the value of the **License Key** from the prior section into **Amazon Connect CTI License Key**. Click **Save** to save your changes.

Update Whitelist

Follow the steps below to add the Adapter site to the Dynamics' whitelist of allowed add-ons. From the same Amazon Connect CTI Settings editor, click **Update Whitelist** to add your site. A confirmation message displays when complete.
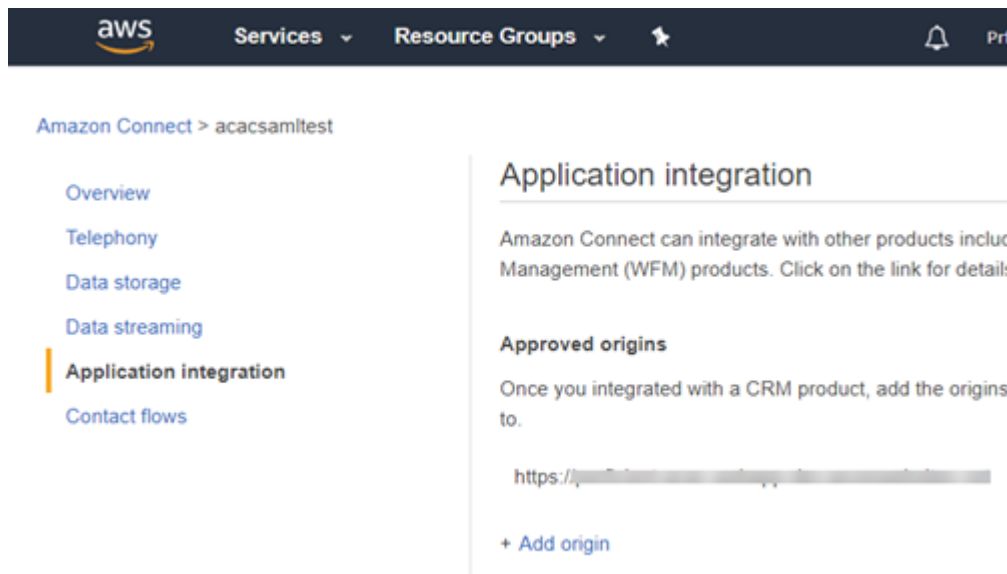
In Amazon Connect

Log in to the AWS Console that your Amazon Connect instance is associated with. Navigate to **Services**, **Amazon Connect** and select your **Instance Alias**.

Update Application Integration

From the menu on the left, select **Application integration** and click **+ Add Origin**. In the resulting pop-up add the URL of the Perficient Adapter Admin site: **https://perficient-acac-webapp-prod.azurewebsites.net** and click **OK**. This adds the Adapter as a valid external application that can integrate with Amazon Connect.

4. Enable Agents for Adapter

Pre-requisites

Before beginning this section, ensure you logged into Microsoft Dynamics 365 as user in the **System Administrator** role.

Follow the steps below to assign Dynamics Users to the **Amazon Connect CTI Agent** role. Any user in this role will see the Adapter when they log in to Dynamics 365.

Return to the User editor and navigate to **Settings > Security.** Select a user and assign them to the **Amazon Connect CTI Agent** role. Repeat this for all users you'd like to grant permissions to use the Adapter.
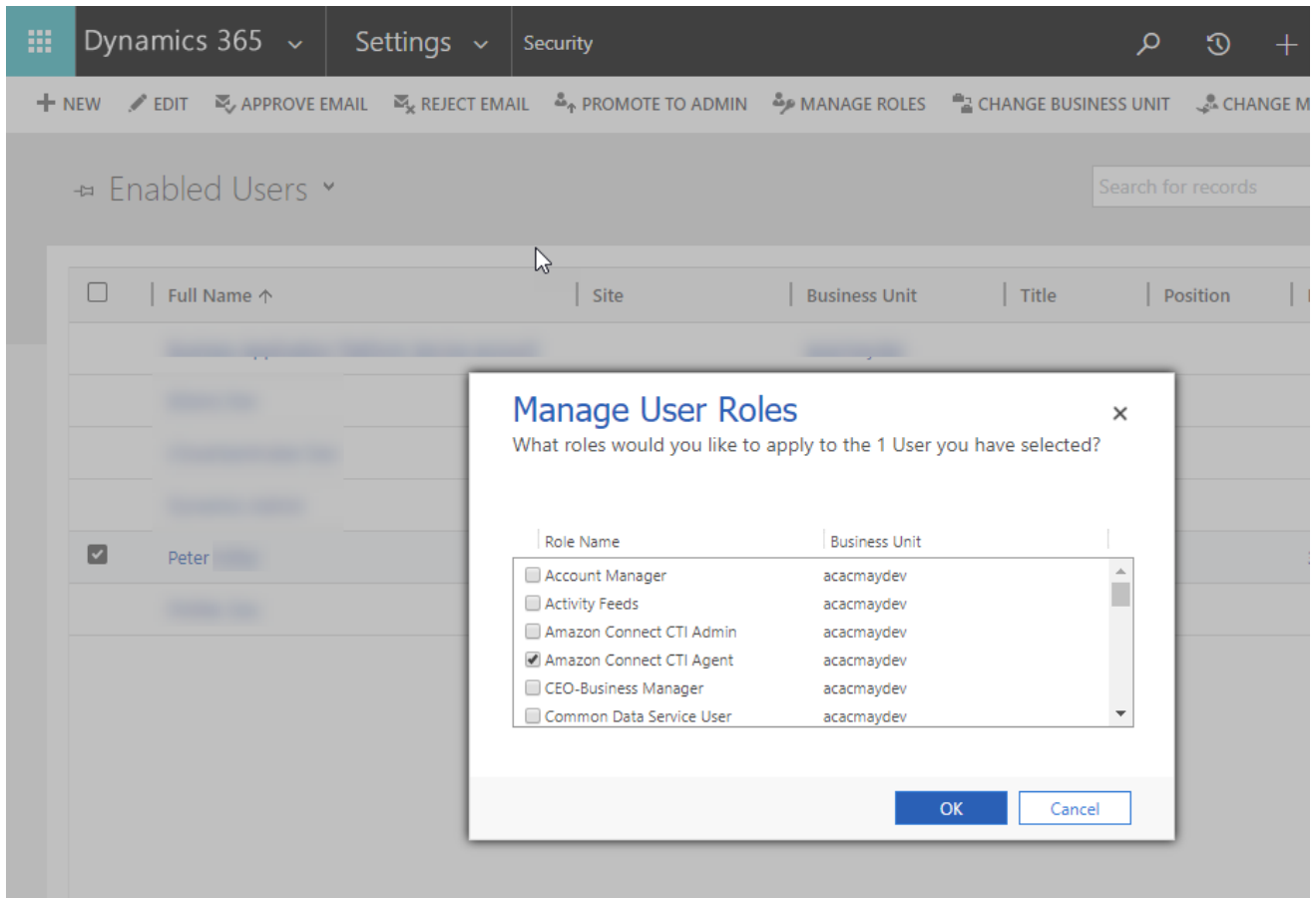
The install and configuration of the Adapter is now complete. The next section of this guide explains how Amazon Connect Agents can use the Adapter in Dynamics.
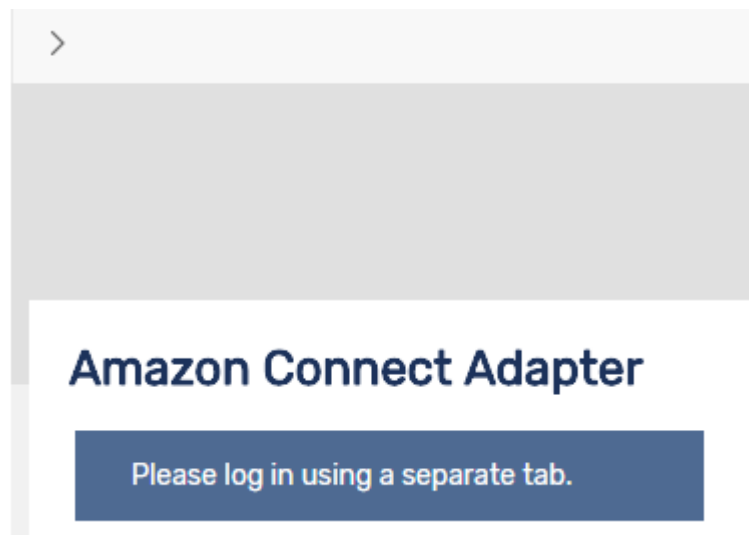
Agents

Log In

When a Dynamics user assigned to the **Amazon Connect CTI Agent** role logs in to Dynamics, the Adapter slides into view from the right side of the screen.
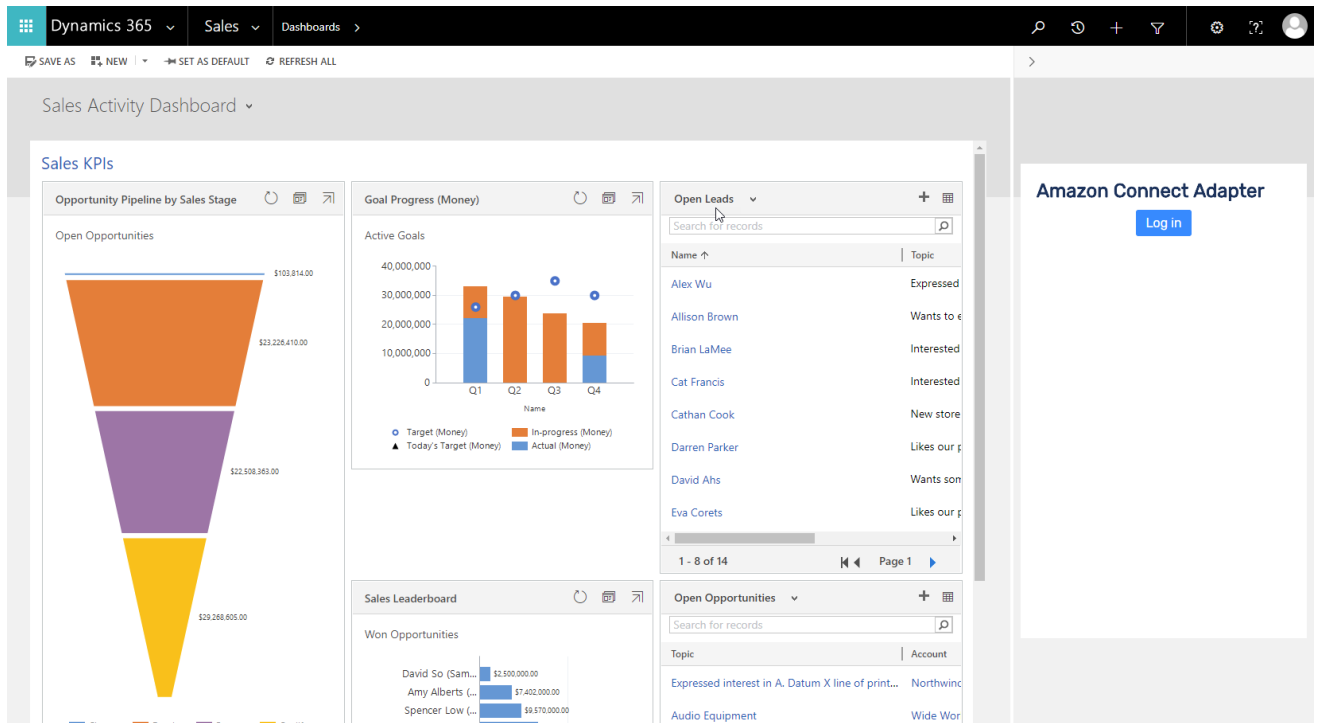
The user must now click **Log In** to log in Amazon Connect.

This opens a new Amazon Connect credentials window. Enter your credentials in this window to initialize the Adapter.
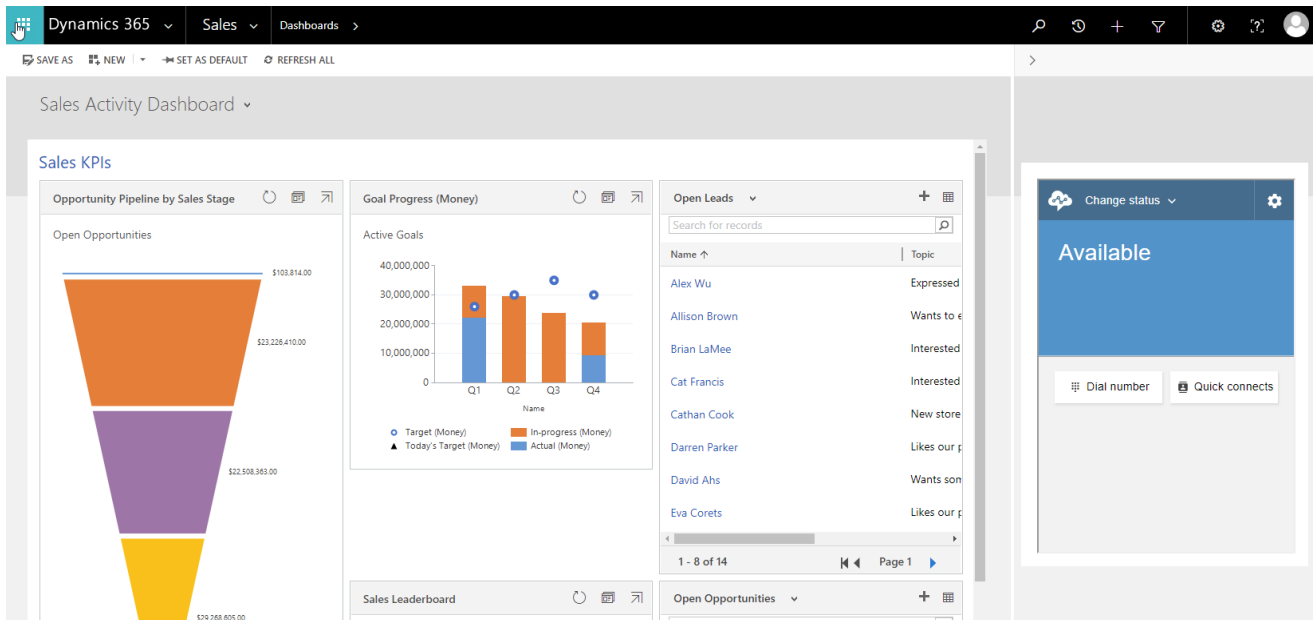
If you are already logged into Amazon Connect, click **Sign In** to immediately initialize the Adapter.

After logging in, the Amazon Connect CCP displays in the side panel, and you are ready to handle calls from Amazon Connect.

The Amazon Connect log in window should close on its own. If it does not, you may close it any time without affecting any functionality.

Screen Pop and Call Control

Once logged in, the Amazon Connect agent can handle incoming calls and place outbound calls as they normally would. All call control functions (such as start and stop hold and transfers) work as usual.

If an incoming call has the appropriate contact attributes set, their Dynamics web client will navigate to a related entity (such as an account) when the agent answers the call.

For more details on how screen pops work, see **Amazon Connect Contact Flows** and the **Toolkit for Microsoft Dynamics 365 by Perficient**.

Log Out

When an Amazon Connect agent is done for the day, they can choose to log out of the Amazon Connect CCP. When doing so, the Adapter displays a message stating they are logged out and to refresh the page to log in again.
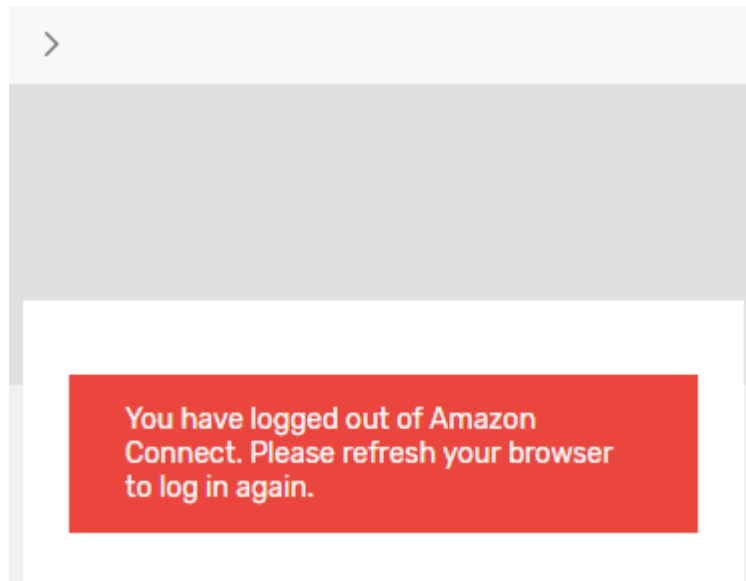
Amazon Connect Contact Flows

Enable Screen Pop

Pre-requisites

Before beginning this section, ensure you are logged into Amazon Connect as a user with the Security Profile of admin.
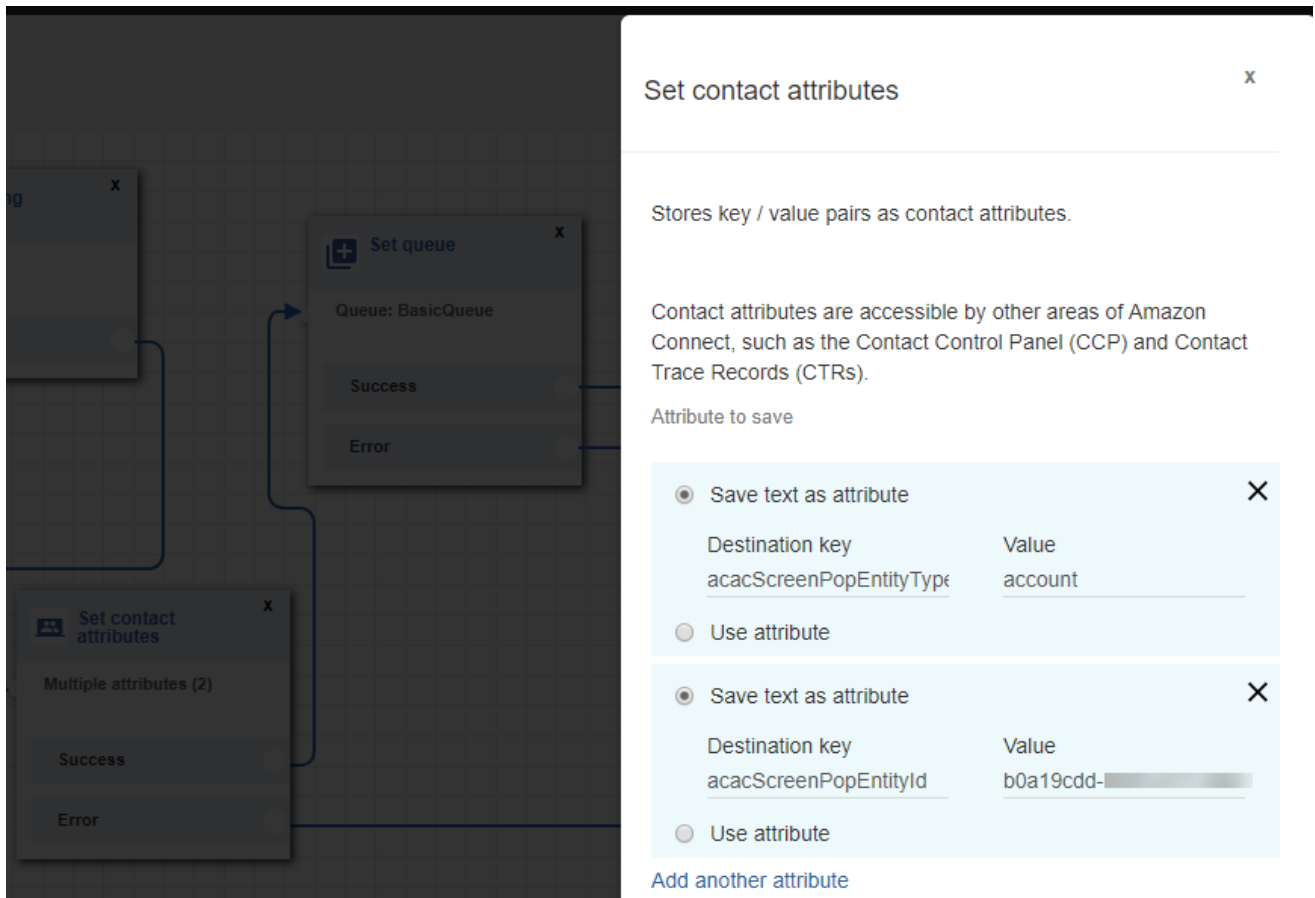
This section explains how to enable screen pops with the Adapter.

The Adapter screen pops to a related entity if the incoming call has the following contact attributes set:

- acacScreenPopEntityType
- acacScreenPopEntityId

The **acacScreenPopEntityType** is the name of the type of entity you want to pop, such as "account" or "case." The **acacScreenPopEntityId** is the unique ID for that entity, which you can obtain from querying the Dynamics Web API.

Within an Amazon Connect Contact Flow, you can set these attributes (after a lookup) using a Set Contact attributes block in the contact flow designer.

To easily perform an Account look up via incoming phone number, follow the steps below to install the **Toolkit for Microsoft Dynamics 365 by Perficient**.
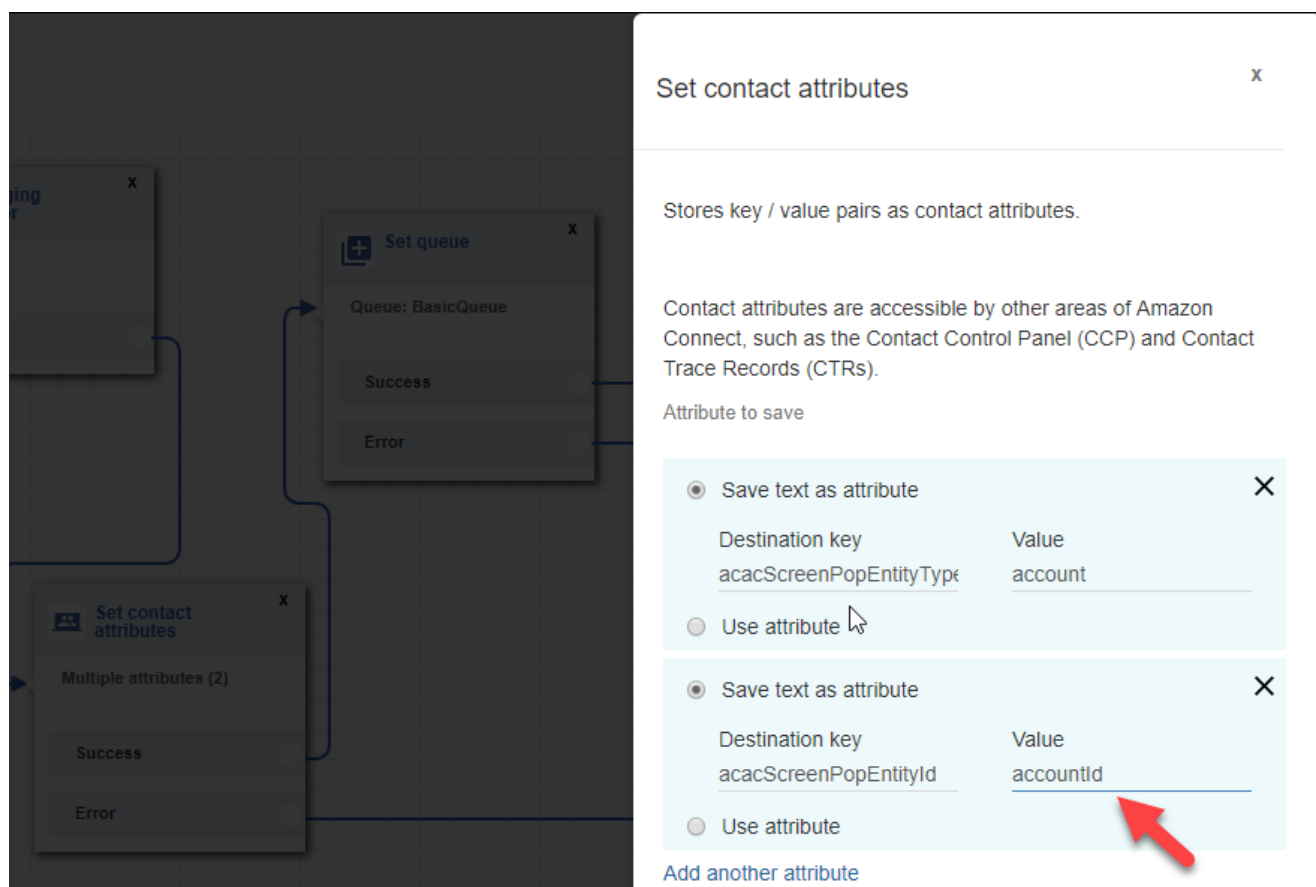
Toolkit for Microsoft Dynamics 365 by Perficient

The **Toolkit for Microsoft Dynamics 365 by Perficient** (Toolkit) is a free offering from Perficient that installs into your AWS instance and enables easy account look-ups by phone number in a contact flow.

This offering is an AWS Quick Start. Please visit {link} for instructions on how to install.

Enable Account Look Up by Phone Number and Screen Pop

After you've installed the Toolkit, follow the instructions in the Toolkit User Guide to create or modify a contact flow to use the included Lambda functions for account lookup. When assigning the results of the Lambda to a contact attribute in a Set Contact Attributes block, make sure you assign accountId to the **acacScreenPopEntityId** and set another attribute of **acacScreenPopEntityType** to account.
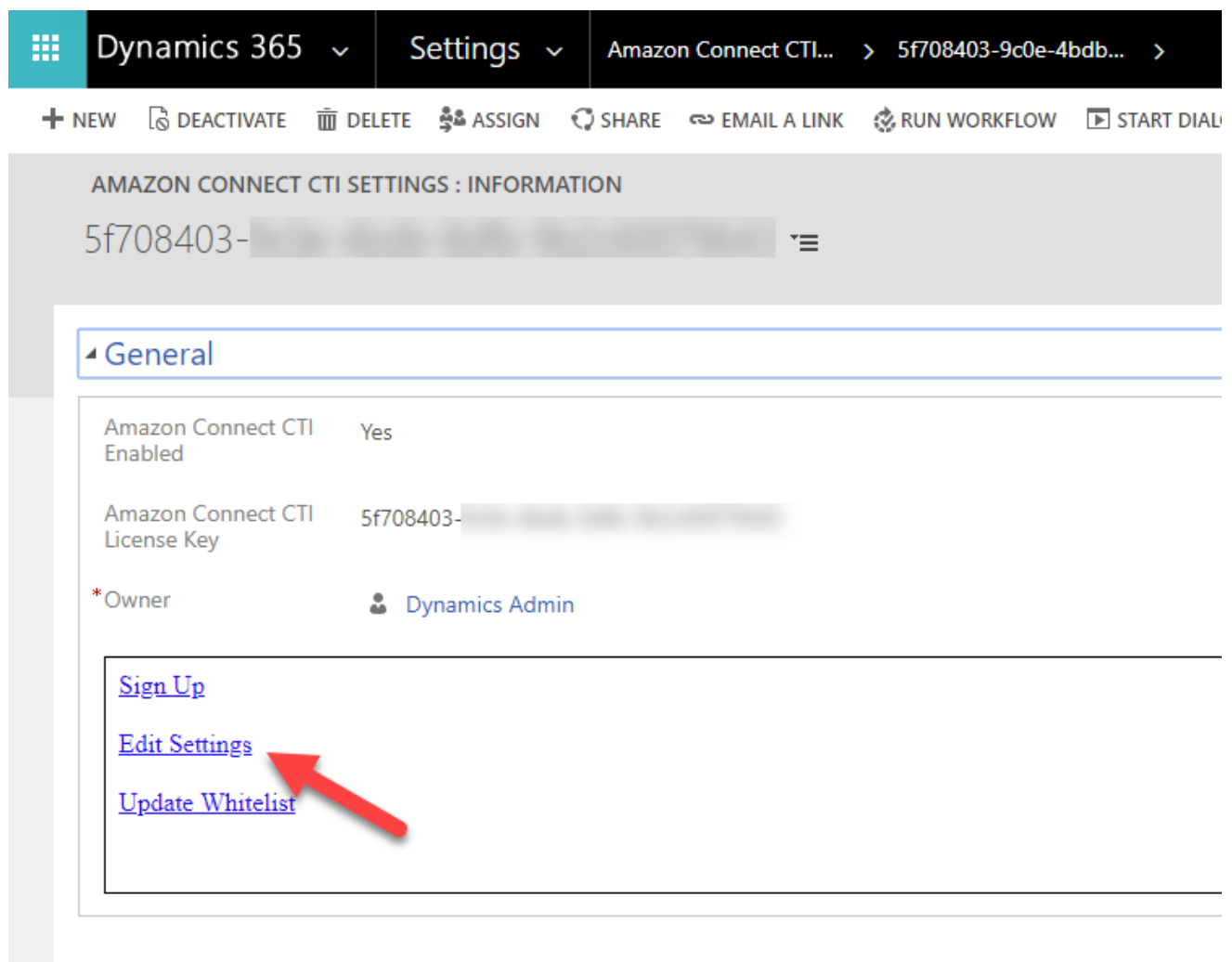
With this tweak, inbound calls with an associated account in Dynamics will screen pop when answered by agents using the Adapter.

Changing Adapter Settings Post-Install

Viewing and Editing Subscription Details

You may visit the admin site at any time to view your subscription information. Not a license key is required to view this information.

There is a link provided in the Amazon Connect CTI 365 Settings editor in Dynamics or you can bookmark the link if you wish.

The subscription settings screen displays your **License Key** (subscription ID), **Subscription Tier**, the **Subscription Start Date** and **Subscription End Date**, and your current settings.

NOTE: Your organization will automatically be renewed for as long as you wish to use the product. The end date represents only the currently active subscription time period.

Updating Subscription Details

From the subscription settings screen, you may click **Edit** to update the two URLs used to configure your integration. While these settings typically do not change once you have configured the product, you may wish to target a different instance of either Amazon Connect or Dynamics 365 at some point. An example might be when moving

from a trial/QA environment to a production environment.

Localization

The admin site and Adapter are localized for the same languages as Amazon Connect:

- English
- Spanish
- French
- Brazilian Portuguese
- Korean
- German
- Simplified Chinese
- Japanese

The Adapter and admin site will adopt whatever language you use in Dynamics. Agents can change the language for the embedded Amazon Connect Control Panel (CCP) under the Settings panel.

NOTE: If you change the language for the CCP from Dynamics, you must refresh your browser for the CCP to reload in your chosen language

Single Sign On

The Adapter is compatible with Amazon Connect's SAML Single Sign On feature. If you are using Azure Active Directory as your federated identity provider, agents must log in to Amazon Connect from their AWS application in **Apps** at http://myapps.microsoft.com.

Support

Find our support email by visiting the Support page at https://perficient-acac-webapp-prod.azurewebsites.net/support/home.