Get Started with Cisco Webex Contact Center for Microsoft Dynamics 365

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Preface

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Change History

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

Change	Date
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	Boldface font is used to indicate commands, such as user entries, keys, buttons, and folder and submenu names. For example: • Choose **Edit** > **Find** • Click **Finish**.
italic font	Italic font is used to indicate the following: • To introduce a new term. Example: A *skill group* is a collection of agents who share similar skills. • For emphasis. Example: *Do not* use the numerical naming convention. • An argument for which you must supply values. Example: IF (*condition, true-value, false-value*) • A book title. Example: See the *Cisco Webex Contact Center Getting Started Guide*.

`window` font	Window font, such as Courier, is used for the following:
	
	• Text as it appears in code or information that the system displays. Example:
	
	`<html><title> Cisco Systems,Inc. </title></html>`
	
	• File names. Example: `tserver.properties`.
	
	• Directory paths. Example:
	
	`C:\Program Files\Adobe`

Communications, Services, and Additional Information

- To receive timely, relevant information from Cisco, sign up at Cisco Profile Manager.

- To get the business impact you're looking for with the technologies that matter, visit Cisco Services.

- To submit a service request, visit Cisco Support.

- To discover and browse secure, validated enterprise-class apps, products, solutions and services, visit Cisco Marketplace.

- To obtain general networking, training, and certification titles, visit Cisco Press.

- To find warranty information for a specific product or product family, access Cisco Warranty Finder.

Cisco Bug Search Tool

Cisco Bug Search Tool (BST) is a web-based tool that acts as a gateway to the Cisco bug tracking system that maintains a comprehensive list of defects and vulnerabilities in Cisco products and software. BST provides you with detailed defect information about your products and software.

Documentation Feedback

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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

- 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

Provide an unified platform to your customers where they can make and receive calls as well as keep a track of all the call activities by installing the Cisco Webex Contact Center with Microsoft Dynamics 365.

Before you begin

You should install the Channel Integration Framework (CIF) application in your system, see https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/channel-integration-framework/ get-channel-integration-framework.

Procedure

Step 1 Open a supported browser and enter the URL https://portal.office.com/. Sign in using Admin credentials and click **Dynamics 365**.

Step 2 Click the **Dynamics 365** drop-down and click **All Apps**

Step 3 Click **Customer Service Hub**.

Step 4 Click the **Dynamics 365** drop-down and click **Get More Apps**.
The **Apps for Dynamics 365** page appears.

Step 5 Search for **Cisco Webex Contact Center for Microsoft Dynamics** and click the icon.

Step 6 Click **Get it Now** and then **Continue**.
The **Microsoft Dynamics 365** market place page appears.

Step 7 Accept the terms and conditions and click **Agree.**

Alternately, you can go to https://appsource.microsoft.com to download the **Cisco Webex Contact Center for Microsoft Dynamics**.

The **Cisco Webex Contact Center for Microsoft Dynamics** is installed.

Step 8 To verify the installation, go to the Dynamics 365 home page and from the navigation bar click the **Settings** icon. Click **Advanced Settings** from the drop-down list.
The **Business Management** page appears.

Step 9 From the **Settings** drop-down menu, click **Solutions**.

You can search for **Cisco Webex Contact Center for Microsoft Dynamics** to verify if it is installed.

Note If the application is not installed, then from the **Settings** drop-down menu, click **Solutions History.** The **Custom Solutions History** page appears. Click the appropriate solution name to view the logs for debugging.

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 356.

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://<tenantName>//WebResources/cjp_ciscoCJPAgentHub*.

  For example: *https://treee.crm8.dynamics.com/WebResources/cjp_ciscoCJPAgentHub*

- **Enable Outbound Communication**: Yes

- **Channel Order**: 1

- **API Version**: 1.0

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 in 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.
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.