

Dynamics 365 CRM, CIF and CTI Configuration



Guidelines to configure Ziwo CTI Application on Dynamics 365 CRM Online (v 9.0 +)
for System Administrator & Users (Agents)

SFR#	Document	Version	Created By	Date	Reviewed By
1	Installing CIF – Channel Integration Framework	1.0	Madhusudan Kushwaha	30-Jan-2020	
2	Installation of CRM Plug-In for Ziwo	1.0	Madhusudan Kushwaha	30-Jan-2020	
3	Configure CIF	1.0	Madhusudan Kushwaha	30-Jan-2020	
4	Configure Admin and Agent details to access CTI Plug-In	1.0	Madhusudan Kushwaha	30-Jan-2020	
5	Modified the steps for CRM Solution Import	2.0	Madhusudan Kushwaha	03-Mar-2020	

Objective: Enabling CIF, Configuring CIF Framework on D365 CRM and Installing the CRM-Ziwo CTI Solution on Customer's Instance.

Pre-Requisites.

- 1) Must have Dynamics 365 CRM License procured.
- 2) Target system must have Dynamics 365 CRM Online Customer Engagement Enterprise environment
- 3) Sandbox / Production environments with Service Module configured.
- 4) CIF – Channel Integration Framework is used as platform for CTI, so need to enable following steps.
- 5) Email Integration – configuration of mailbox, exchange server etc. (Outlook or Gmail as per customer preference).

1. Installing the CIF (Channel Integration Framework) for CTI Integration

Follow below document released by Microsoft to enable/install the CIF from Microsoft's Marketplace.



How to get Dynamics 365 Chanr

Or follow below link.

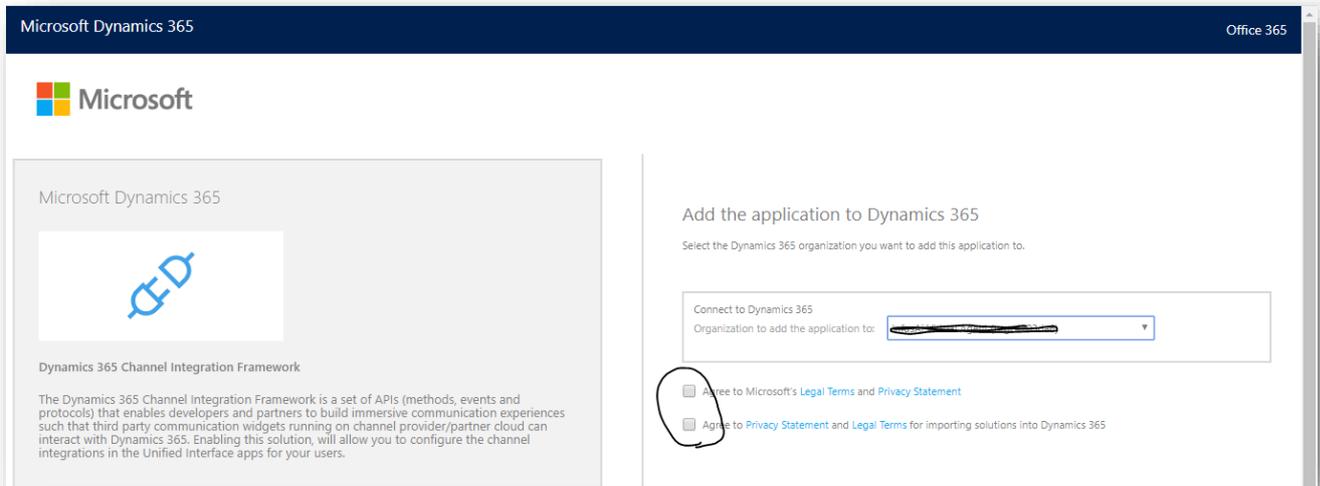
<https://docs.microsoft.com/en-us/dynamics365/customer-service/channel-integration-framework/get-channel-integration-framework>

Once above setup are completed on D365 CRM Instance, you can start with the configuring in Dynamics 365 CRM Instance for CTI following below steps.

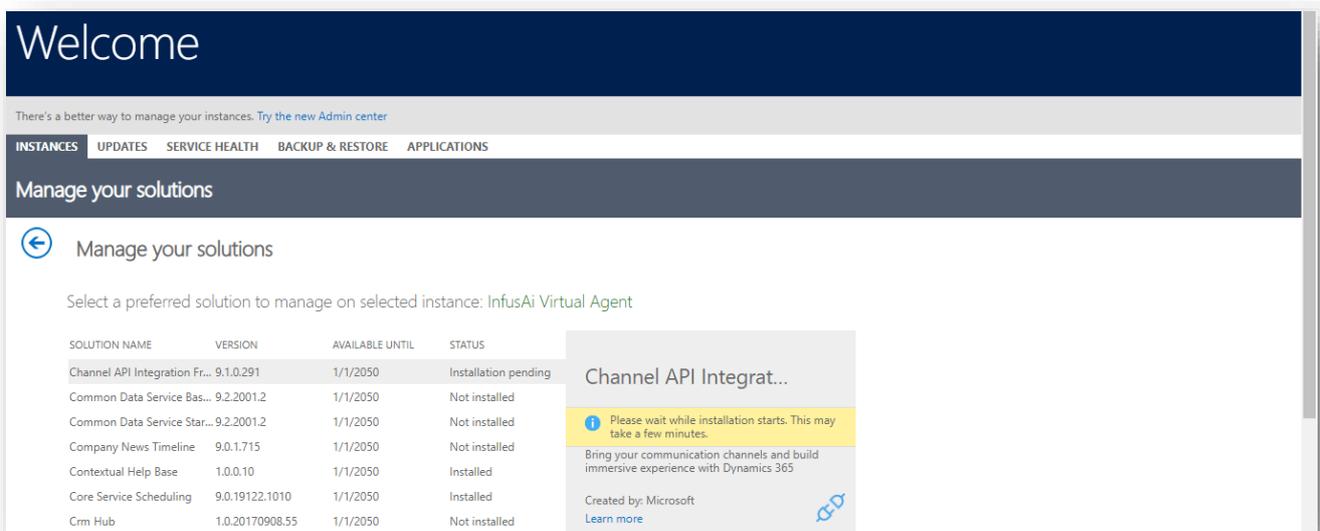
Browse the URL and click on "Get It Now"

The screenshot shows the Microsoft AppSource page for the 'Dynamics 365 Channel Integration Framework'. The page includes a search bar, navigation links, and a 'GET IT NOW' button that is circled in red. The description states: 'The framework to build immersive communication experiences to interact with Dynamics 365. The Dynamics 365 Channel Integration Framework is a set of APIs (methods, events and protocols) that enables developers and partners to build immersive communication experiences such that third party communication widgets running on channel provider/partner cloud can interact with Dynamics 365. Enabling this solution, will allow you to configure the channel integrations in the Unified Interface apps for your users.'

Connect with the Organization Instance, select on which instance CIF needs to install. Select the agreement checkbox.



Click on Agree Button, it will start configuring the CIF on the selected instance of Dynamics 365.



Once the installation is completed will be highlighted as below and activated on CRM. Now its ready to use for CTI Integration.

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Channel API Integration Fr...	9.1.0.291	1/1/2050	Installed
Common Data Service Bas...	9.2.2001.2	1/1/2050	Not installed
Common Data Service Star...	9.2.2001.2	1/1/2050	Not installed
Company News Timeline	9.0.1.715	1/1/2050	Not installed
Contextual Help Base	1.0.0.10	1/1/2050	Installed
Core Service Scheduling	9.0.19122.1010	1/1/2050	Installed

Channel API Integrat...

Bring your communication channels and build immersive experience with Dynamics 365

Created by: Microsoft

[Learn more](#)



Follow further steps for Installing the CRM-Ziwo CTI Application Solution.

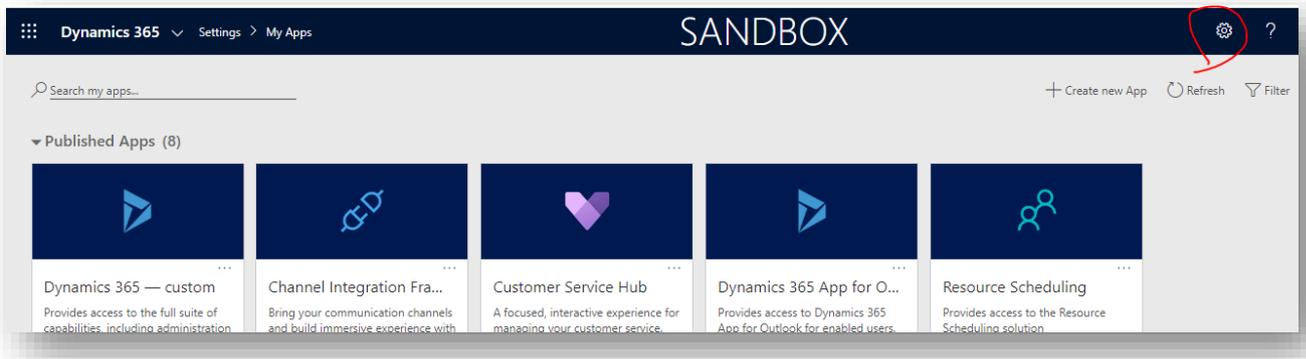
2. Installation of Ziwo CTI Plug-In Application (CRM Solution)

Follow the standard solution deployment steps to install ZiwoCTI Integration Plug-In solution on D365 CRM Instance.

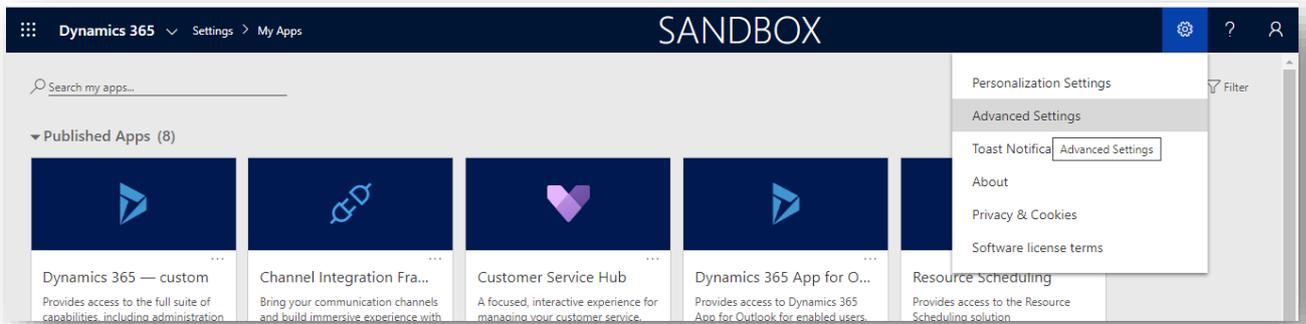
Solution Name

Find the ZiwoCRMCTIIntegration_1_0_0_1_managed.zip

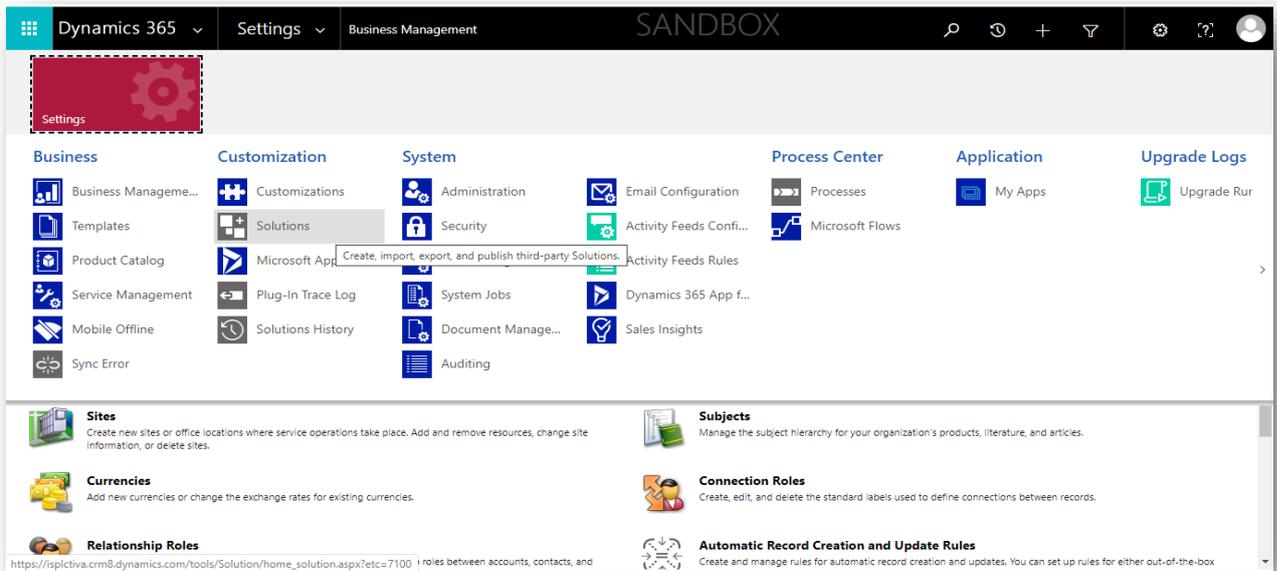
Login to D365 CRM Instance (Sandbox / Production) using the admin credentials, on home screen find the settings icon.



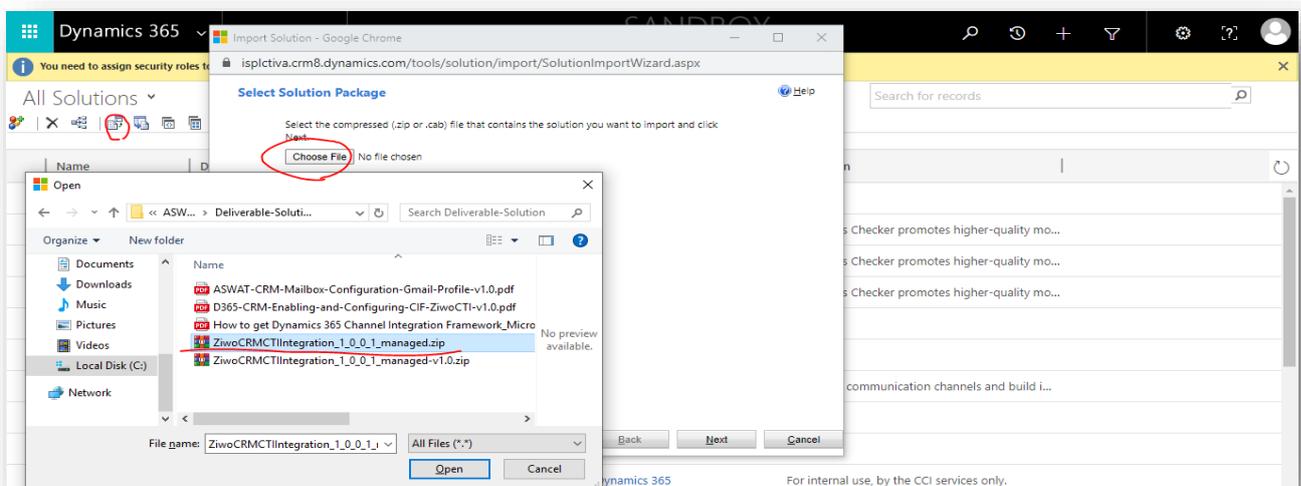
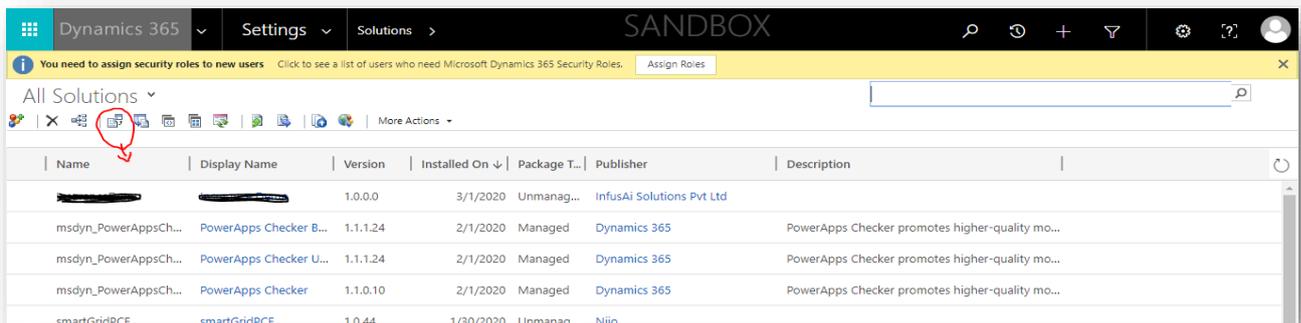
Select “Advance Settings”



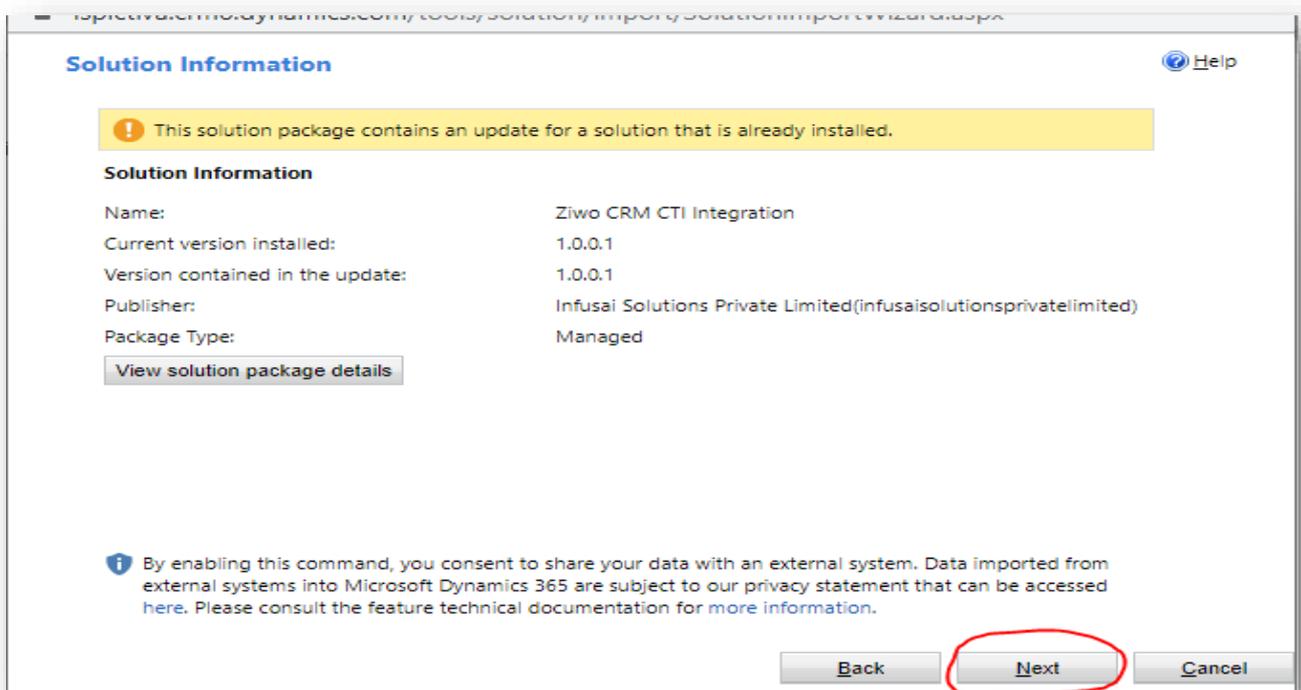
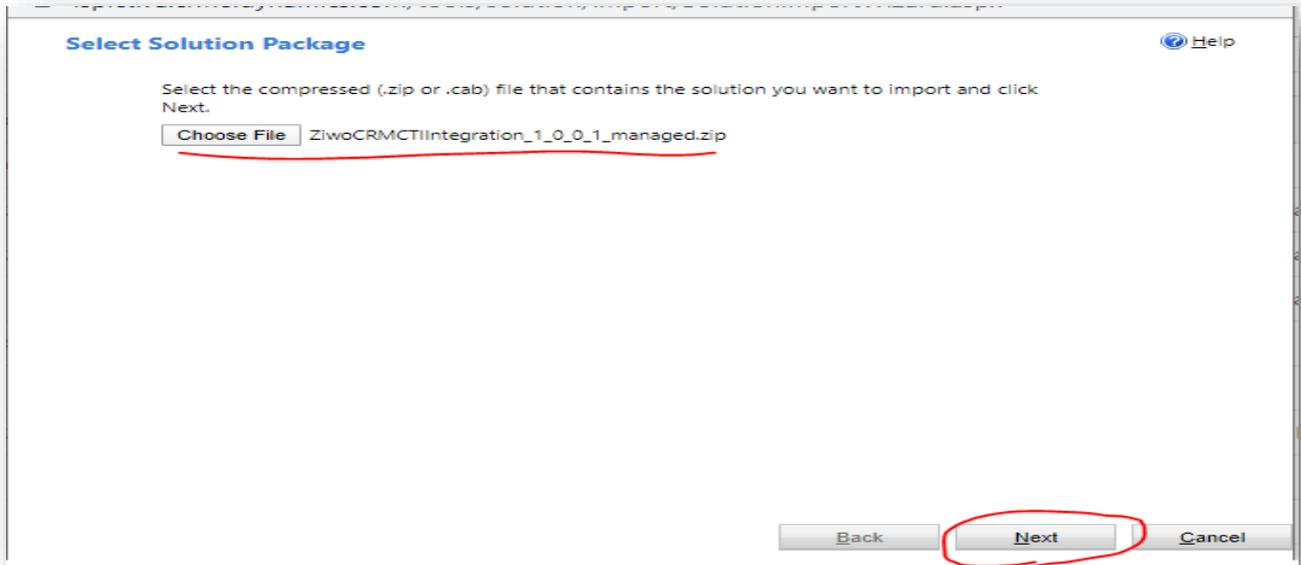
Click the down-arrow next to settings, and select “Solution”



Click on the "Import" icon on Solution toolbar and browse the file.

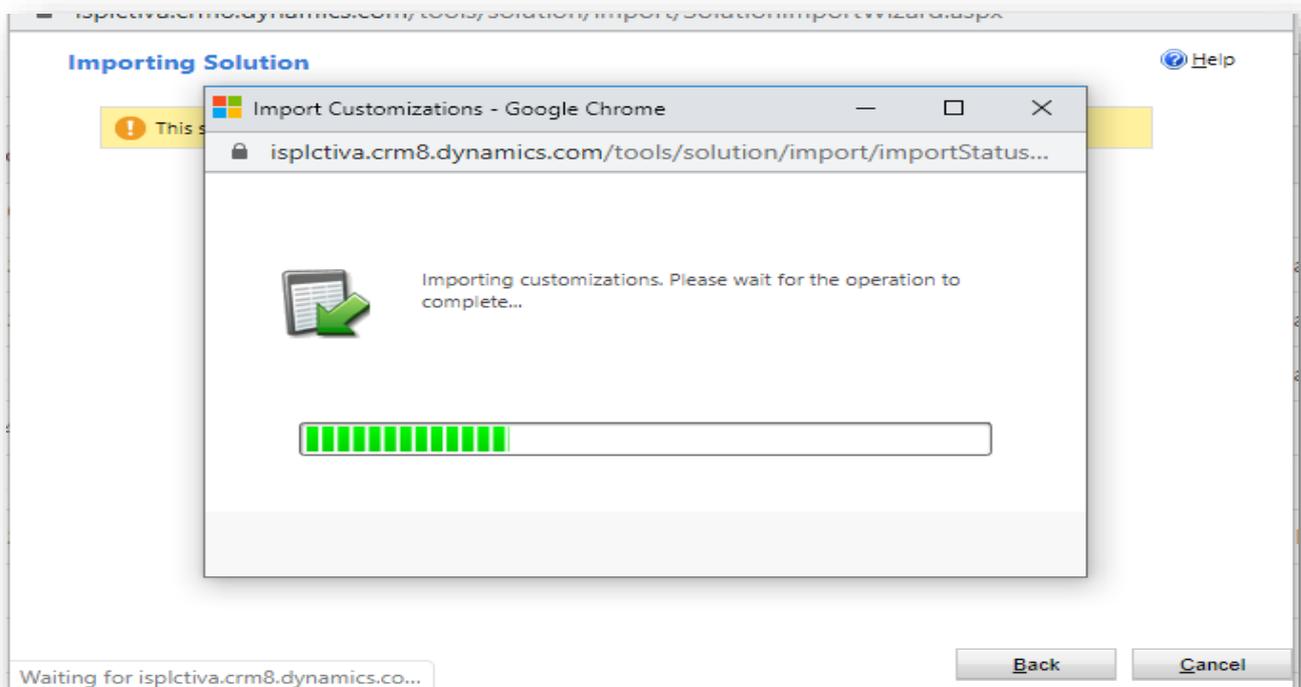
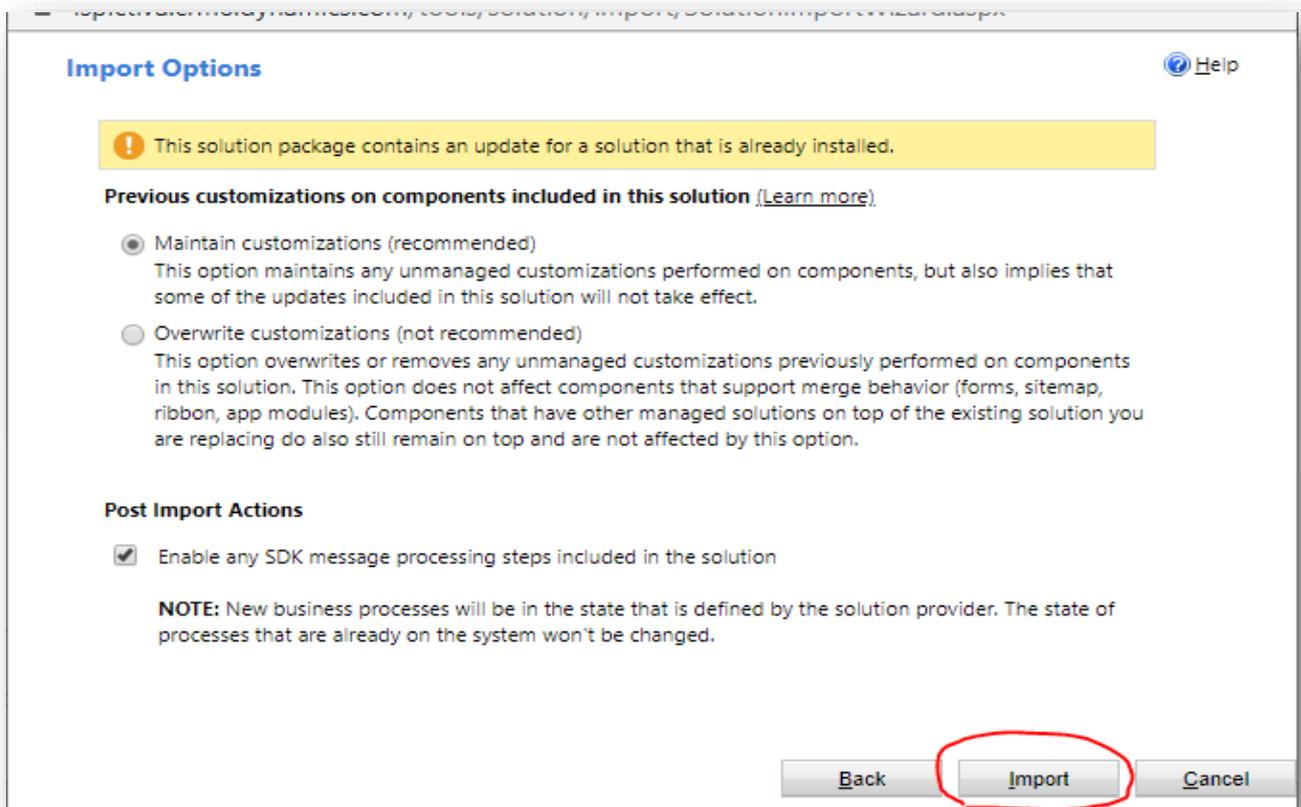


Follow below installation process & click “next”.

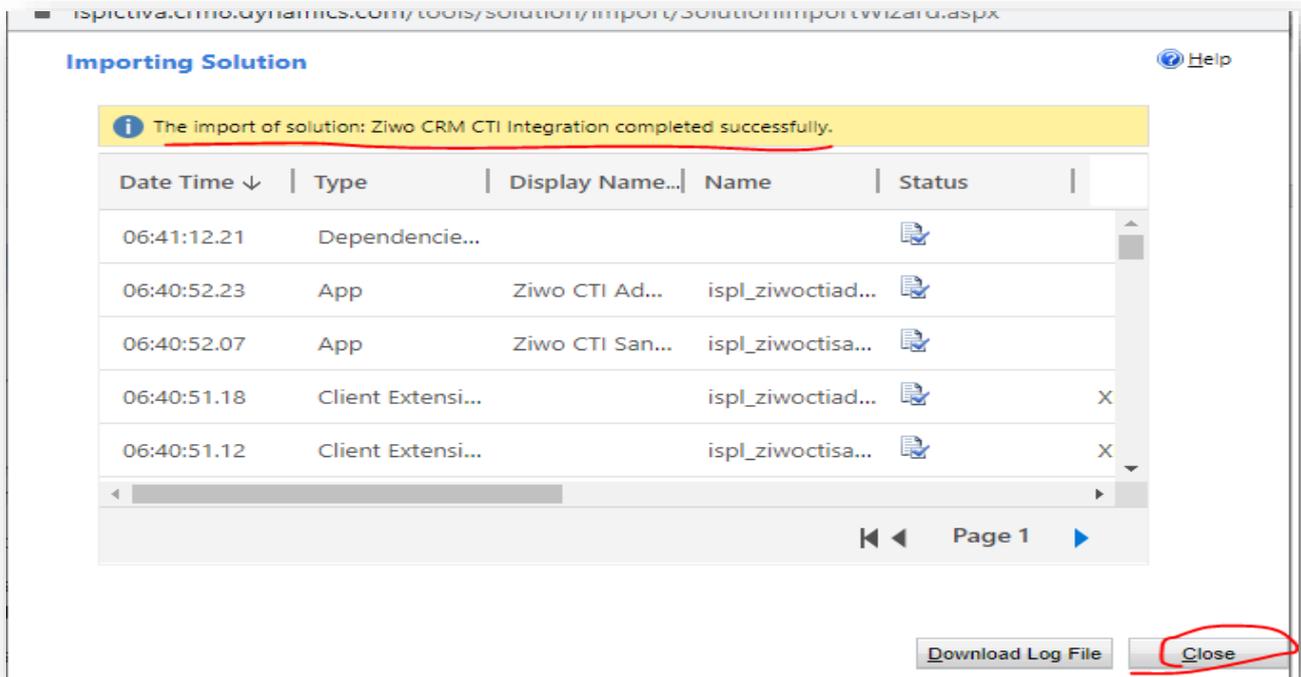


Click on “Import” button, will start installing the solution on D365 CRM Instance.

It w



It will complete the installation.

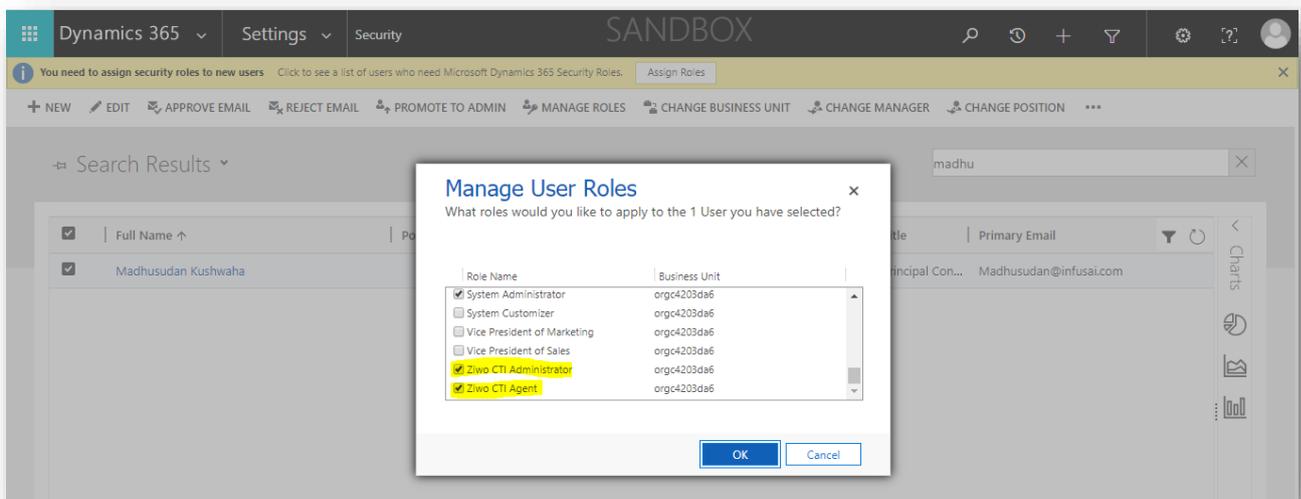


Once the solution is installed successfully, can find the security roles “Ziwo CTI Administrator” and “Ziwo CTI Agent” under the security settings.

Role Assignment to User

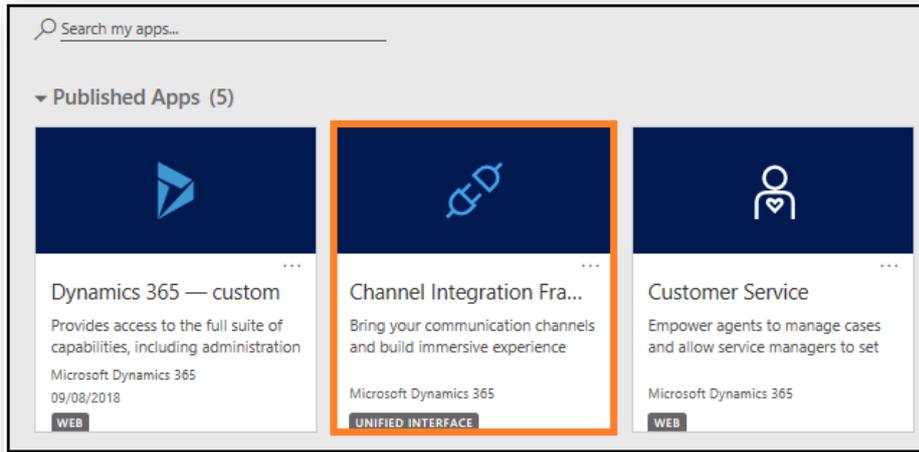
Assign the “Ziwo CTI Administrator” role to user Id which you will use to configure the CTI application, alternatively can be configured by System Administrator ID of organization (Dynamics 365 CRM) as well.

Assign the “Ziwo CTI Agent” role to the agent user Id, who will be accessing CRM for daily operations.

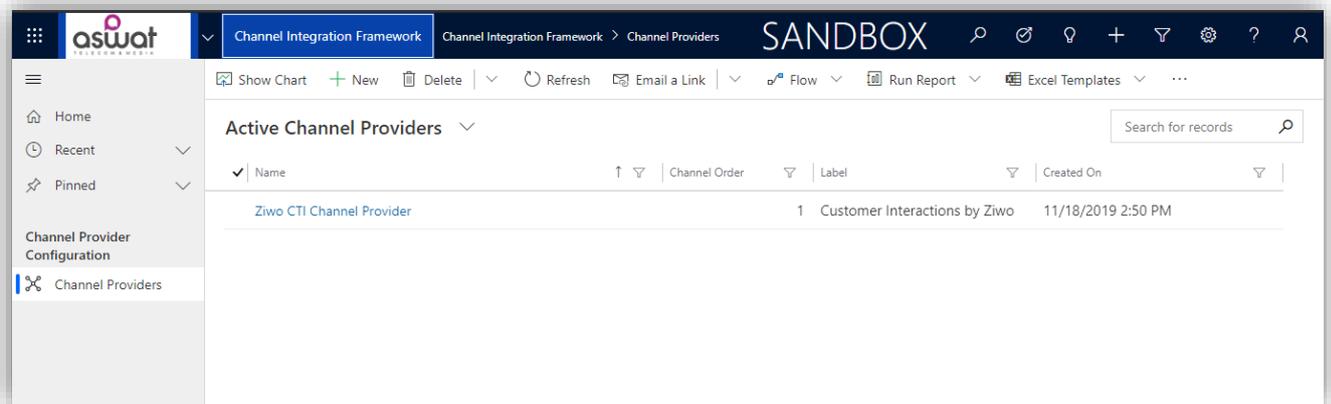


3. Configure Channel Provider on CIF

Browse the URL <https://home.dynamics.com> and find the Application named “Channel Integration Framework”



It will open the application and will show similar screen.



Note: If you do not see the above screen, can click on “Channel Provider” from the left navigation.

Now click on “+ New ” button from top ribbon (toolbar), to create a record.

Fill-up the details referring below screen and enter the details.

Name: Ziwo CTI Channel Provider

Label: Customer Interactions by Ziwo

<you can enter the Label wish to see on Plugin>

Channel URL: https://ziwoctuat.crm4.dynamics.com//WebResources/ispl_ZiwoCTIWebResource

<you can enter the Dynamics 365 CRM URL for the Plug-In we have developed to run on CIF Component>

Replace the URL “ziwoctiuat.crm4.dynamics.com” with Customer’s Dynamics 365 CRM domain.

Enable Outbound Communication: Yes

Channel Order : 1

API Version: 1.0

Select Unified Interface Apps for the Channel : “Ziwo CTI Sandbox”

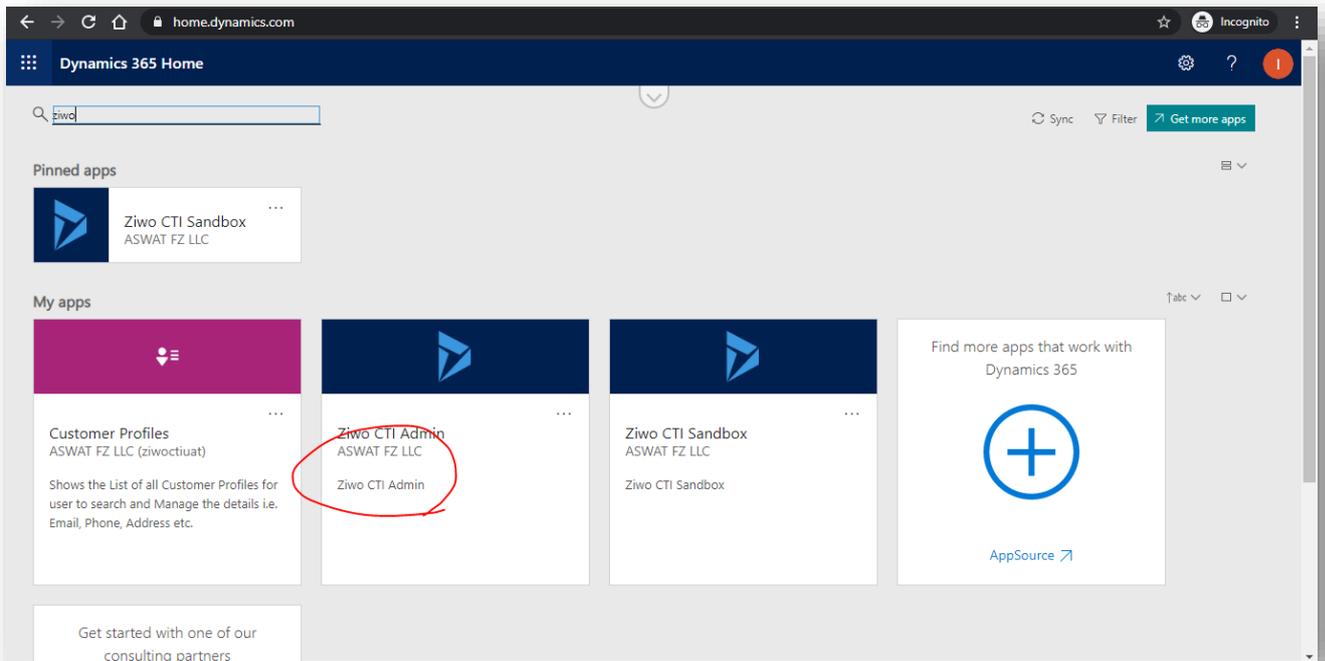
Select the Roles for the Channel : “Ziwo CTI Agent” “Ziwo CTI Administrator”

4. Configure Ziwo Plug-In by Administrator App

Login to D365 CRM accessing the following URL.

<https://home.dynamics.com>

Locate the application “Ziwo CTI Admin”



Select the Ziwo CTI Admin application and will open as below.

Name	Contact Center Name	Created On	Owner
Ziwo-CTI-dantooine	dantooine	12/23/2019 11:12 AM	# Sharangah

Navigate to “Ziwo Configuration” from left panel and click on “+ New” to configure the Admin part of CTI.

Fill the Ziwo Instance details and Ziwo Admin User’s credentials.

- Contact Center Name <ziwo domain name>
- Default Country
- Admin Credentials.

Ziwo-CTI-dantooine
Ziwo Configuration

General Related

General

Name Ziwo-CTI-dantooine

Contact Center Name * dantooine

Default Country Code (2 digit ISO) * LK

Ziwo ADMIN

Ziwo Administrator Username * chathura.abeywickrama@a...

Ziwo Administrator Password *

Save the record and will auto populate the URL's for integration.

Ziwo-CTI-dantooine
Ziwo Configuration

General Related

Ziwo ADMIN

Ziwo Administrator Username * chathura.abeywickrama@a...

Ziwo Administrator Password *

Ziwo API Url's

Jorel JS Library	https://jorel.ziwo.io/master/latest/jorel.js
Ziwo Authentication URL	https://dantooine-api.aswat.co/auth/login
Ziwo Click to Call API	https://dantooine-api.aswat.co/integrations/cti/agents/call/
Ziwo CDR List API	https://dantooine-api.aswat.co/callHistory/?contactNumber=
Ziwo CDR List API by Call ID	https://dantooine-api.aswat.co/callHistory/
Ziwo Recording API	<a href="https://dantooine-api.aswat.co/callHistory/<ID>/recording?access...">https://dantooine-api.aswat.co/callHistory/<ID>/recording?access...
Ziwo CDR Agent List API by Agent ID	https://dantooine-api.aswat.co/callHistory/listAgents?deleted=false

Active | Modified On: 1/16/2020 7:11 PM | Modified By: Infusai Admin | Save

Now we will be setting up the Agents and associate the same with the CTI Plug-In for accessing on CRM.

+ New Deactivate Delete Refresh Assign Share Email a Link Flow Word Templates Run Report

Ziwo-CTI-dantooine # Sharangah 12/23/2019 11:12 AM # Sharangah
 Ziwo Configuration Owner Created On Created By

General Related

General
 Name Ziwo-CTI-dantooine

Ziwo CTI Agents (Agent Configuration)

Name	Agent	Ziwo Agent Username
...		

Click on the button highlighted “ ... ” and click on “+ New Ziwo CTI Agent”, and will open the form as below.

aswat TELECOM & MEDIA Ziwo CTI Admin SANDBOX

Save Save & Close + New Flow

New Ziwo CTI Agent Agent Created On Created By

General

Name * ---
 Owner * Infusai Admin

Status

Status * Active

Agent Configuration

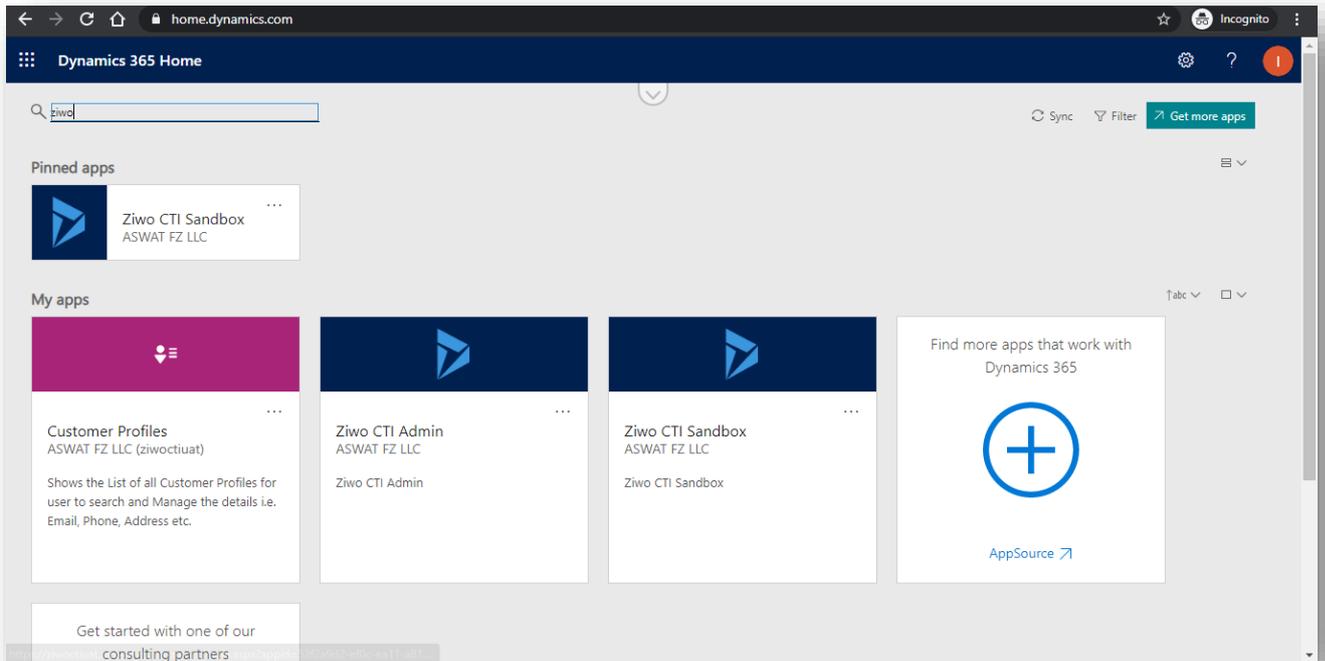
Agent * ---
 Ziwo Agent Username ---
 Ziwo Agent Password ---

Fill the details for Agent, Agent’s username / password following the screencast.

5. Accessing the CRM – Ziwo CTI Plug-In

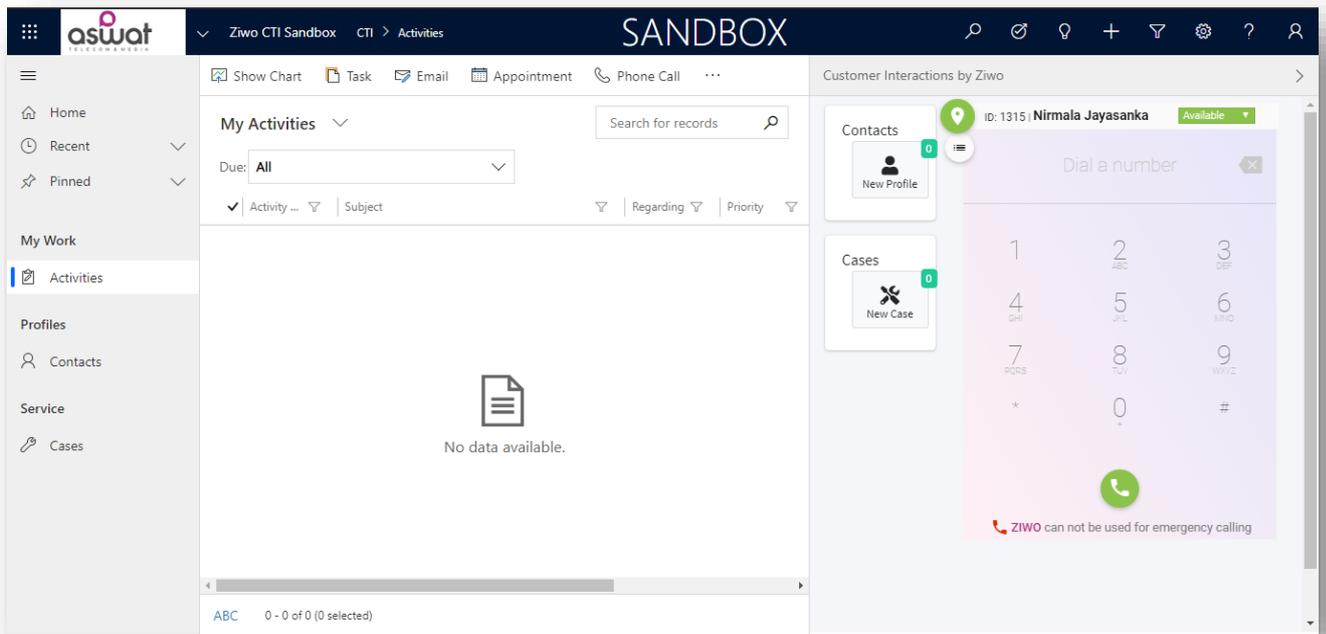
Once the agents are configured in CRM and appropriate Security Role is assign to users, will be able to access the Plug In on CRM Screens.

Login to <https://home.dynamics.com>



Find the App named “Ziwo CTI Sandbox”

Click on it and will launch the application to operate in CRM.



Follow the features to make Outbound and Inbound calls, record the details, create case/ticket for the customer and update the information on call.

<End of Document - Enable CIF and Configuration CTI>