

## Dynamics 365 CRM, Ziwo CTI User Manual



Step-wise Guidelines to of Ziwo CTI Application on Dynamics 365 CRM Online

SFR#	Document	Version	Created By	Date	Reviewed By
1	User Manual	1.0	Madhusudan Kushwaha	30-Jan-2020	
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**Objective:** CTI Integration of ZIWO with Dynamics 365 CRM. Functions of CTI with Click-to-call, Manage Customer Profile, Cases on the call.

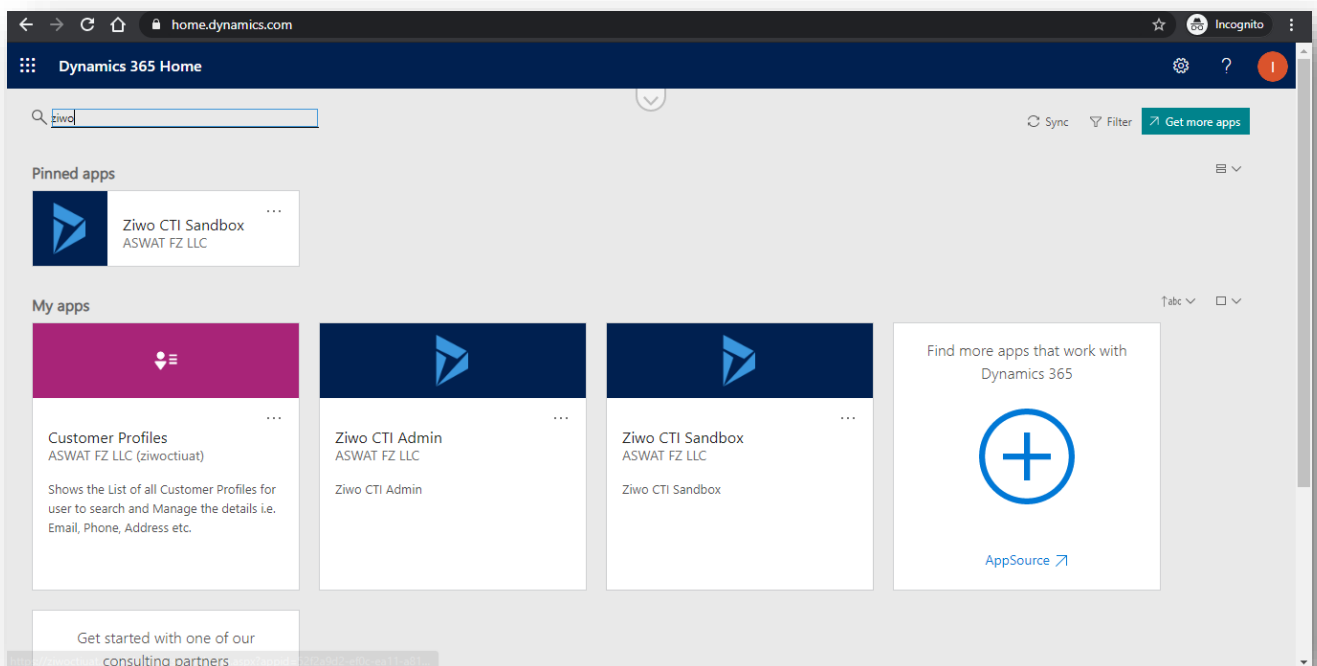
### Pre-Requisites for CTI Application.

- 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. Accessing the CRM – Ziwo CTI Plug-In

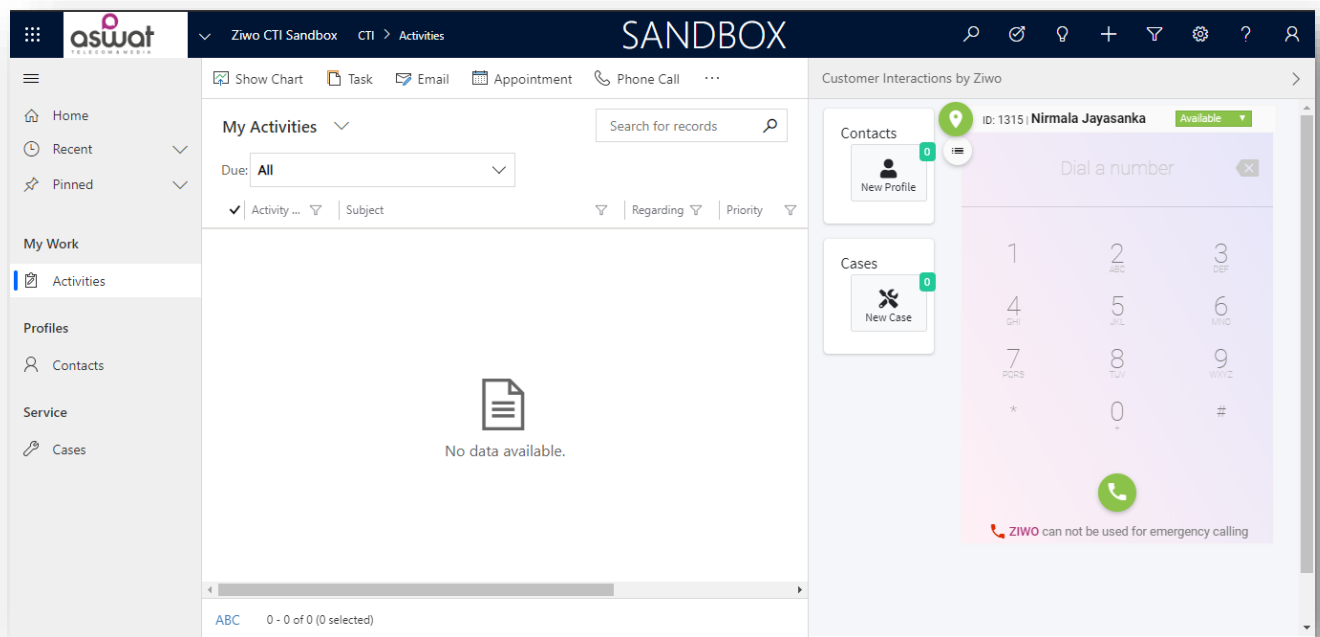
Once the agents are configured in CRM and appropriate Security Role is assign to users, will be able to access the Plug In on CRM Screens.

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



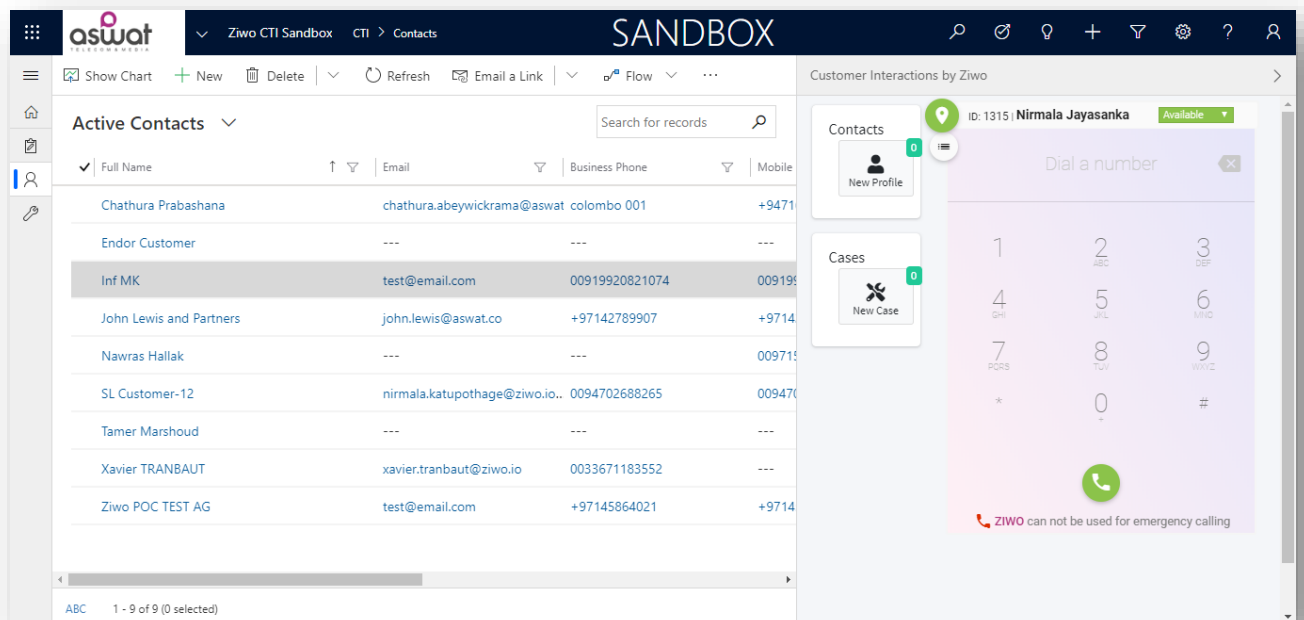
Find the App named “Ziwo CTI Sandbox”

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

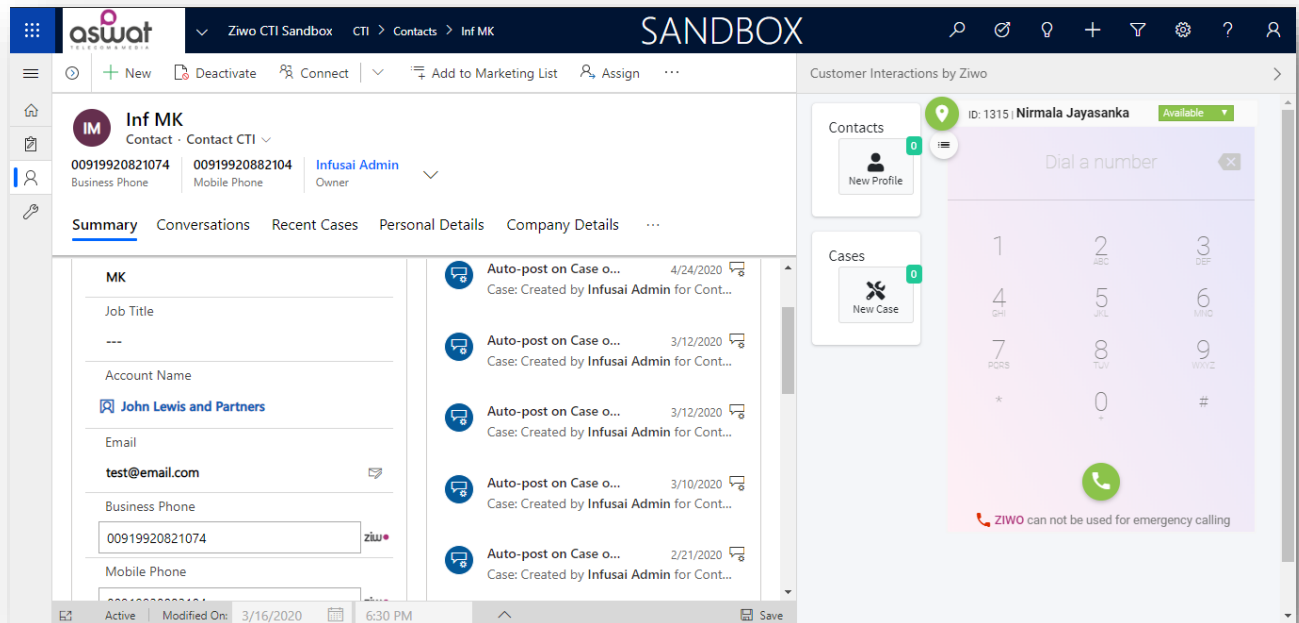


Follow the features to make Outbound and Inbound calls, record the details, create case/ticket for the customer and update the information on call.

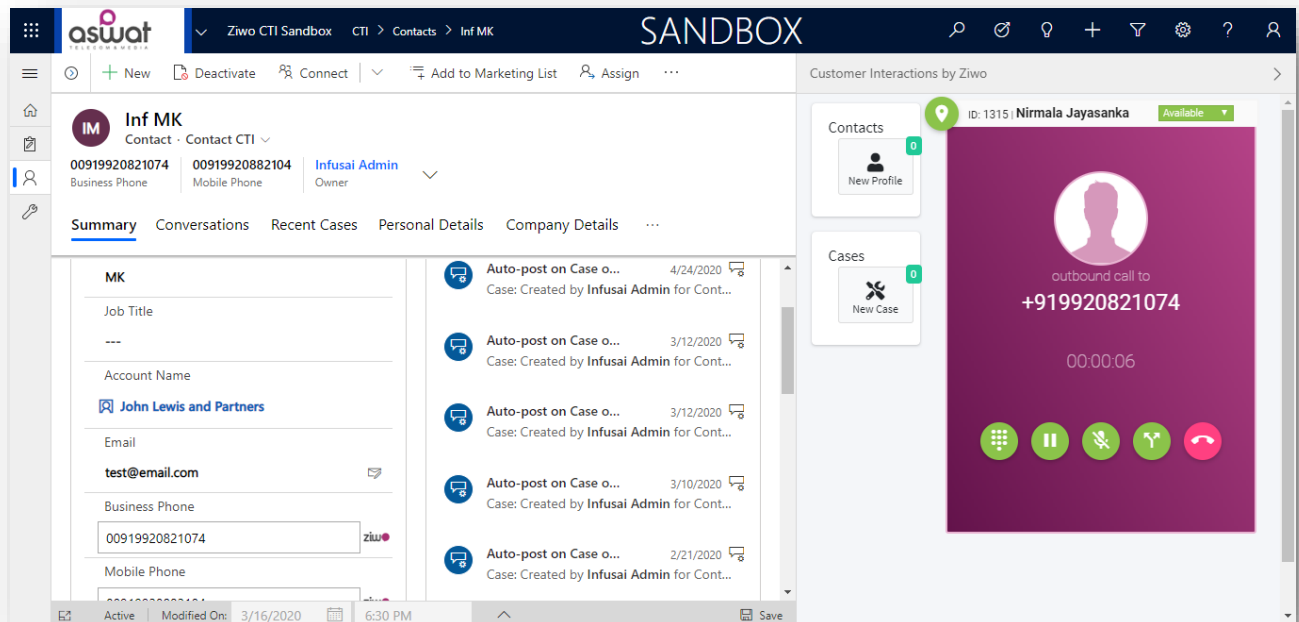
- 1) Navigate to the Contact entity form the left panel.



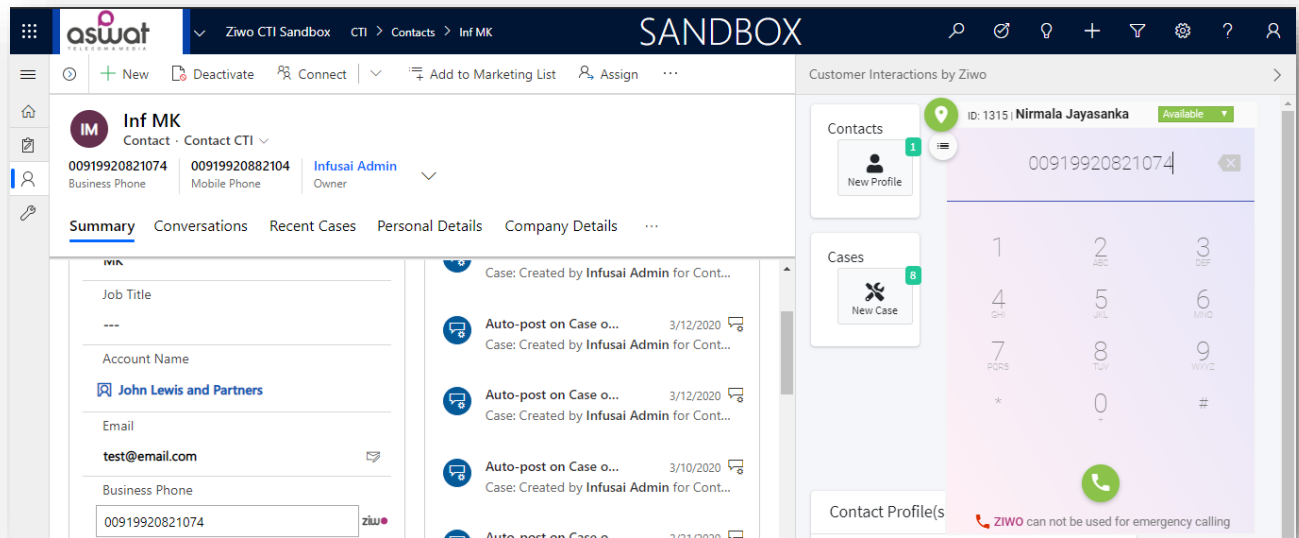
- 2) Open and Contact record, here will allow to place Outbound (Click-to-Call) feature.



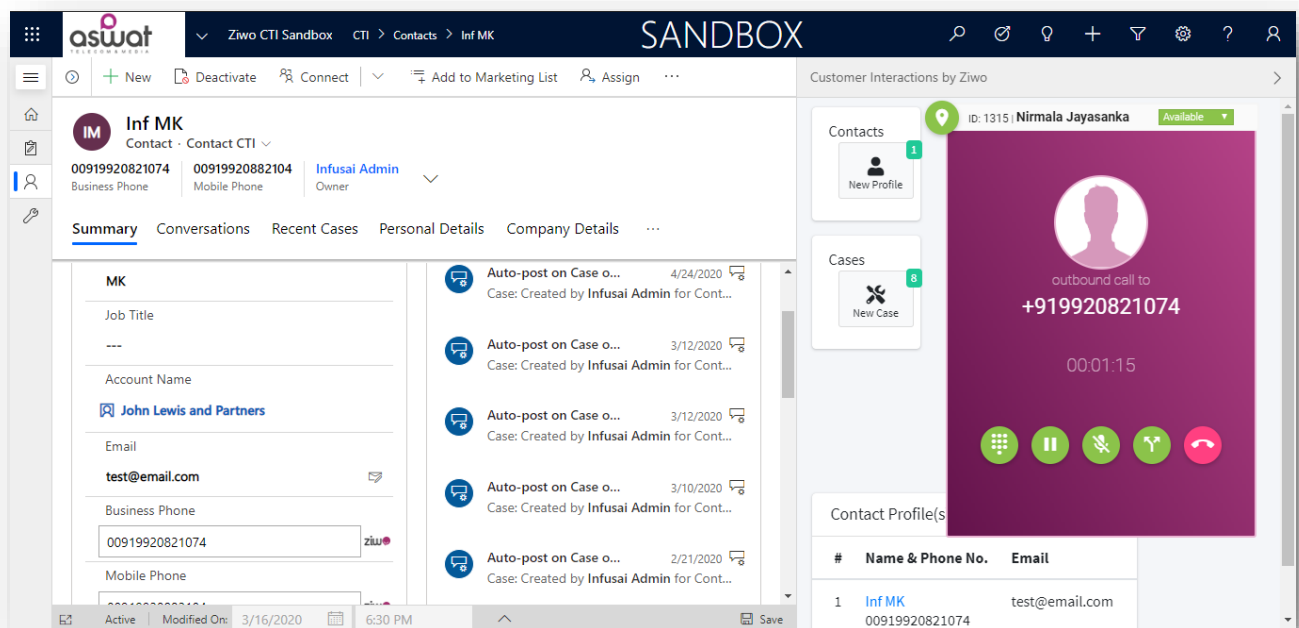
- 3) Click on the Business Phone field ICON (Ziwo) to place Outbound calls / Click-to-Call.



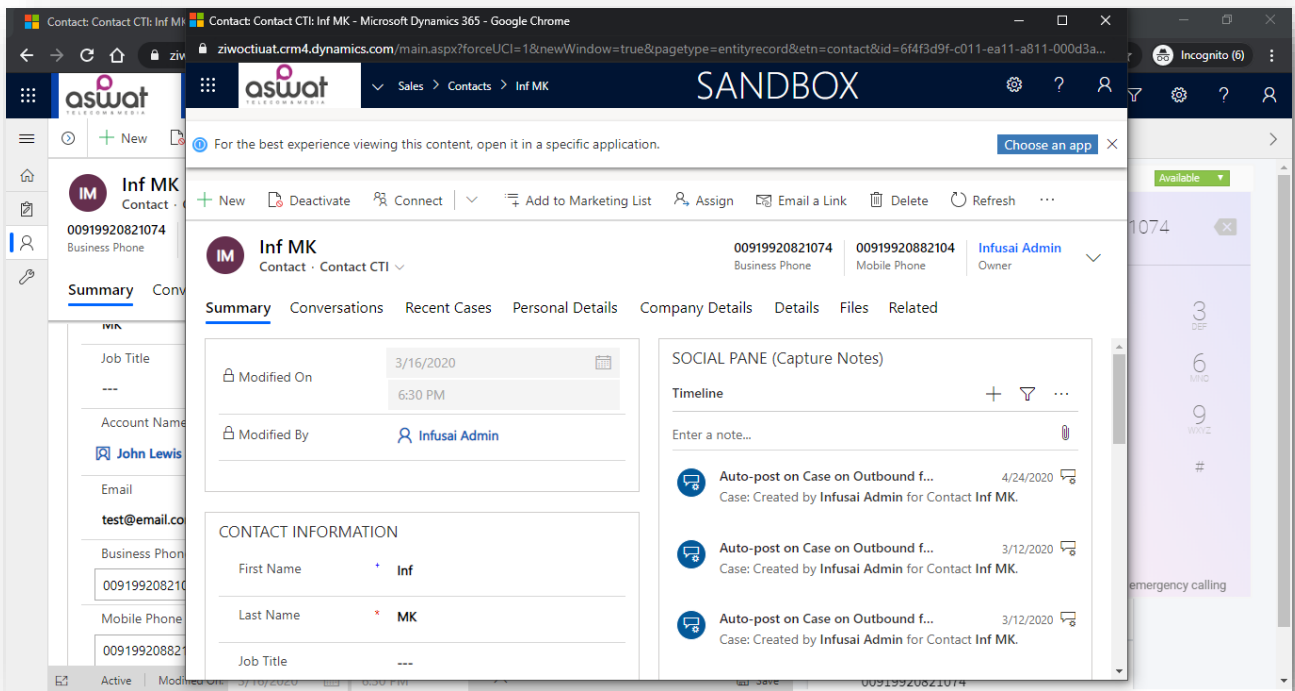
OR directly dial the Phone Number from the ZIWO Plug-In.



Call is place and when connected, system will be searching the Profile by phone number and will list the matching customer's profile.

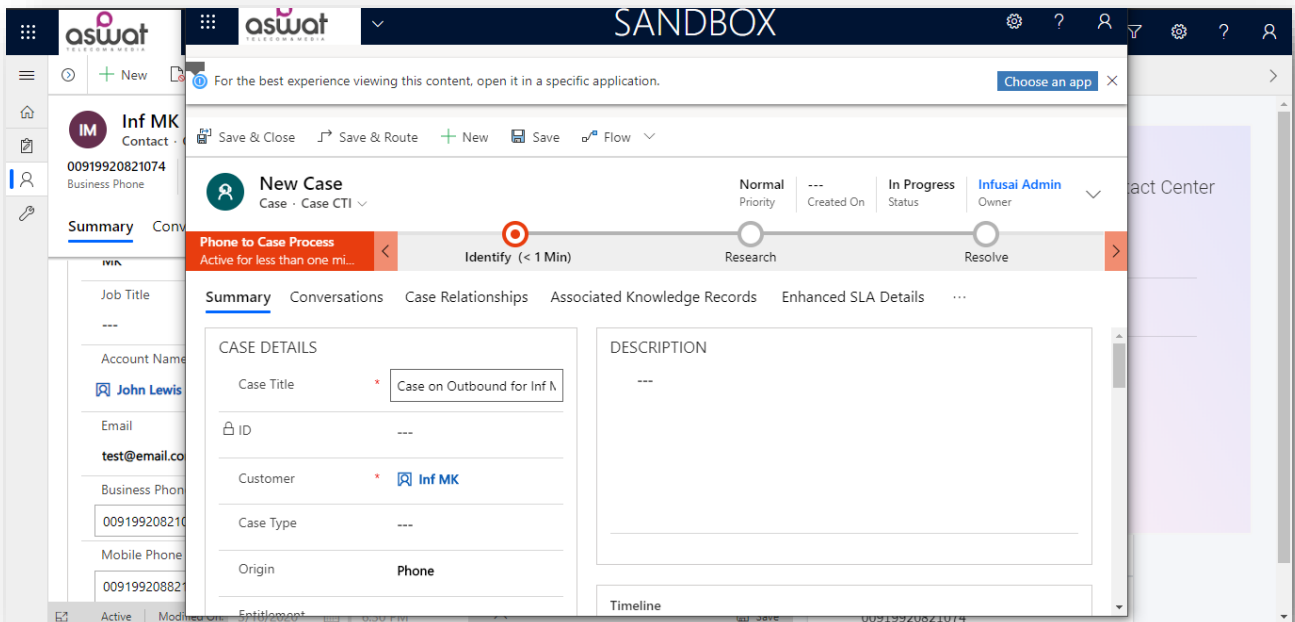


4) If there is only one matching profile, will popup the Contact form in new window.



This allows agents to capture the notes under timeline, and fill up the required details while discussion with Customer.

5) Hangup the call, a case form will popup.



6) Agent will create case and Save.

Last conversation will be listed on Case Form under conversation tab.

**Case on Outbound for Inf MK**  
Case · Case CTI

Normal Priority | 4/25/2020 12:18 AM Created On | In Progress Status | Infusai Admin Owner

Phone to Case Process Active for 1 minute | Identify (1 Min) | Research | Resolve

Summary | **Conversations** | Case Relationships | Associated Knowledge Records | Enhanced SLA Details | Additional Details | Social Details

Call ID  
d1f5c02c-2613-00ec-53cb-9cc47e3ae9f1

Inbound and Outbound Voice Call Recording(s)

ID	Start Date	End Date	Call Result	Agent
10450	4/25/2020, 12:10:29 AM	4/25/2020, 12:12:27 AM	answered	Nirmala Jayasanka

0:00 / 1:17 | Total Duration 118s | Direction outbound

User can play the recording on case for future reference.

7) Same will appear on Contact form under Conversation tab.

**Inf MK**  
Contact · Contact CTI

00919920821074 Business Phone | 00919920882104 Mobile Phone | Infusai Admin Owner

Summary | **Conversations** | Recent Cases | Personal Details | Company Details | Details | Files | Related

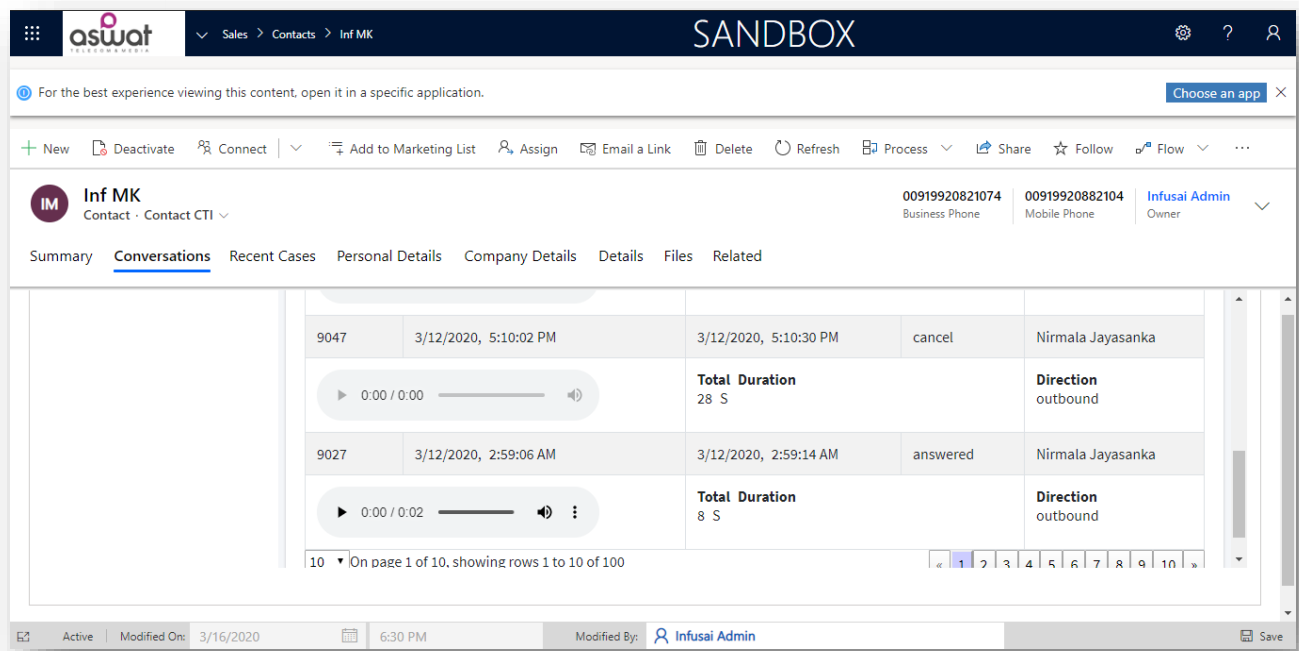
Inbound and Outbound Voice Call Recording(s) Load More

ID	Start Date	End Date	Call Result	Agent
10450	4/25/2020, 12:10:29 AM	4/25/2020, 12:12:27 AM	answered	Nirmala Jayasanka

0:00 / 1:17 | Total Duration 118s | Direction outbound

Active | Modified On: 3/16/2020 6:30 PM | Modified By: Infusai Admin

It displays all the past conversations as well. Click on “Load More” and will list all the history.



The screenshot displays the Dynamics 365 CRM CTI interface. The top navigation bar shows 'Sales > Contacts > Inf MK' and a 'SANDBOX' environment. Below the navigation bar, there's a toolbar with various actions like 'New', 'Deactivate', 'Connect', 'Add to Marketing List', 'Assign', 'Email a Link', 'Delete', 'Refresh', 'Process', 'Share', 'Follow', and 'Flow'. The main content area shows the 'Inf MK' contact details, including 'Contact - Contact CTI'. The 'Conversations' tab is selected, displaying a list of calls. The table below shows two calls:

Call ID	Start Time	End Time	Status	Direction	Agent
9047	3/12/2020, 5:10:02 PM	3/12/2020, 5:10:30 PM	cancel	outbound	Nirmala Jayasanka
		<b>Total Duration</b>	28 S		
		<b>Direction</b>	outbound		
9027	3/12/2020, 2:59:06 AM	3/12/2020, 2:59:14 AM	answered	outbound	Nirmala Jayasanka
		<b>Total Duration</b>	8 S		
		<b>Direction</b>	outbound		

At the bottom, there's a status bar showing 'Active', 'Modified On: 3/16/2020', '6:30 PM', 'Modified By: Infusai Admin', and a 'Save' button.

- 8) Same works for the Inbound calls, when customer calls to the Agent and System will show the Inbound call on CRM to attend.
- 9) Above all functions are same for Inbound as well.

<End of Document – D365 CRM and CTI User Manual >