

Knowlarity's Super Receptionist for Dynamics 365

User Guide

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About Super Receptionist for Dynamics 365

Integrating SuperReceptionist with Dynamics 365 unlocks advantages which streamline service communications while providing support reps with access to a wide range of valuable data. The integration helps manage all the functionalities of a powerful contact center right inside Dynamics applications.

SuperReceptionist connector in Dynamics 365 allows you to:

- Track incoming calls from customers
- Create with phone numbers
- Direct incoming calls from customers to respective agents
- Make outbound calls using Click-to-Call feature
- Track outbound calls
- Transfer call to others(Agents/Supervisor)
- Conference call

About this Guide

This guide is specifically designed for users of Super Receptionist CTI for Dynamics 9.1 and higher. This guide is not intended for system/network administrators and does not provide any information on how to set up the application on user desktops or how to configure the Dynamics instance to be able to use this application. This user guide will show you how to use this application and provide known issues/limitations of the application as well as some basic troubleshooting questions and answers.

Requirements

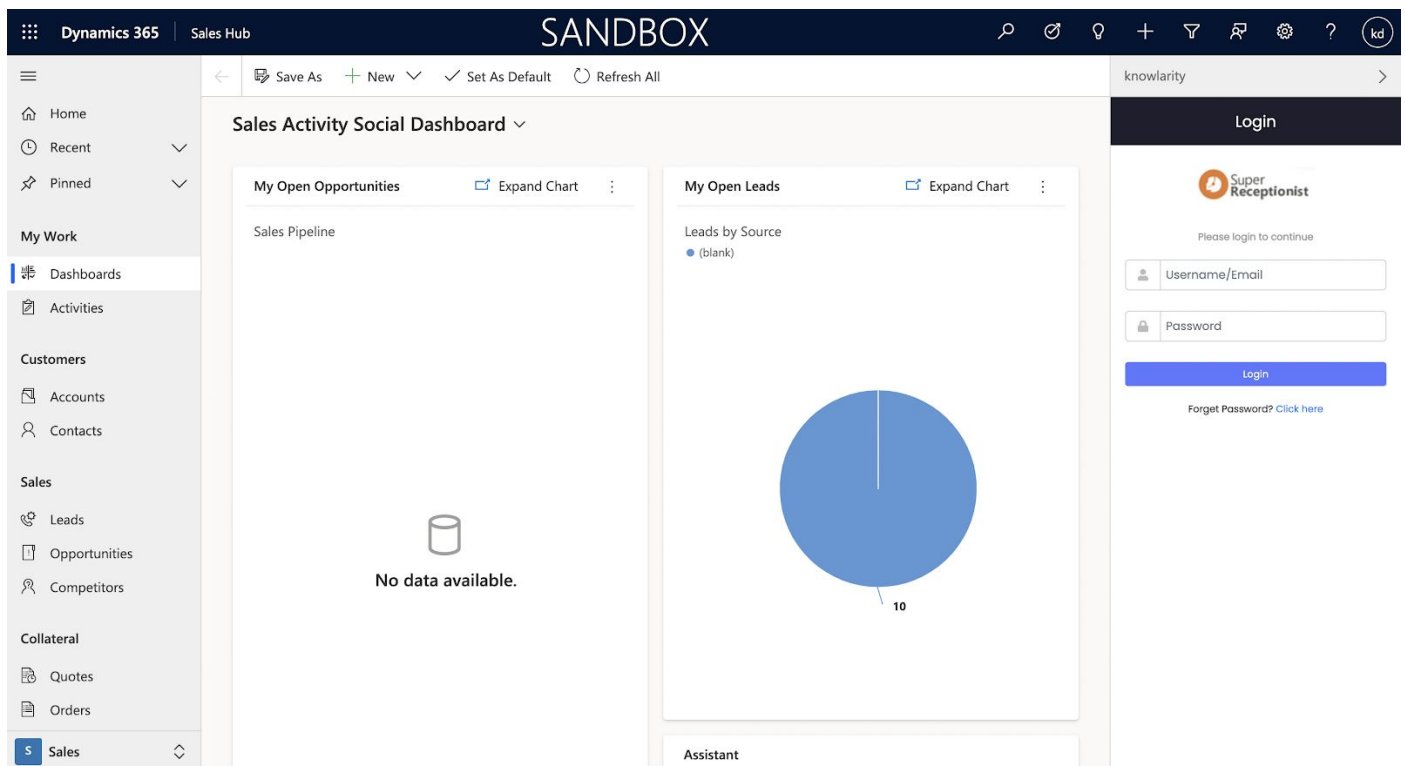
1. Super Receptionist Advance and higher plan
2. Dynamics 365 (online) version 9.1 and higher versions
3. Browsers: Google Chrome (recommended version 69 or later) or Microsoft Edge

Getting Started

1. Update browser to the latest version
2. Install and Configure Super Receptionist for Dynamics 365
3. Check from your administrator for which Unified Interface Apps, Super Receptionist plugin is configured

Login

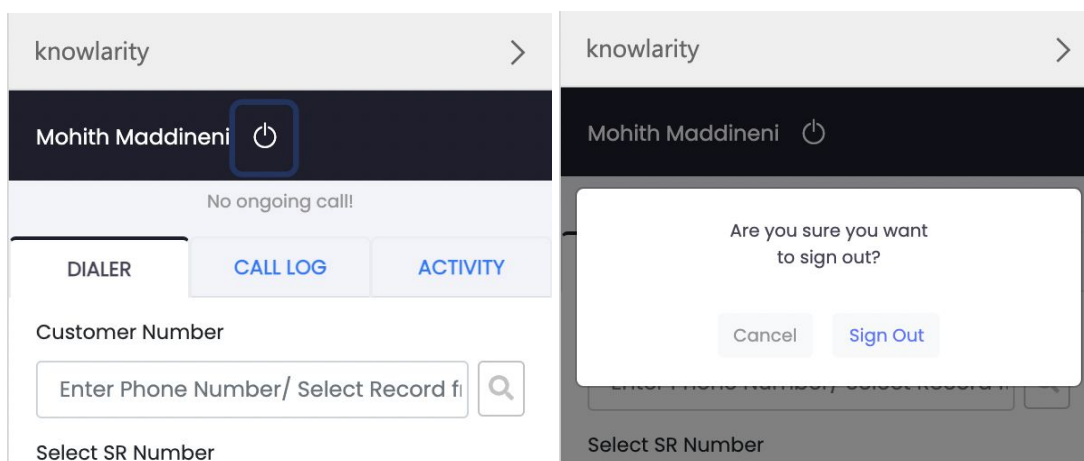
Open any Unified Interface Apps for which the Super Receptionist application is configured and it will appear in the sidebar on the right-hand side.



Use your Super Receptionist account credentials to login.

Log out

Click on the 'Power' icon beside the Username and select log out.



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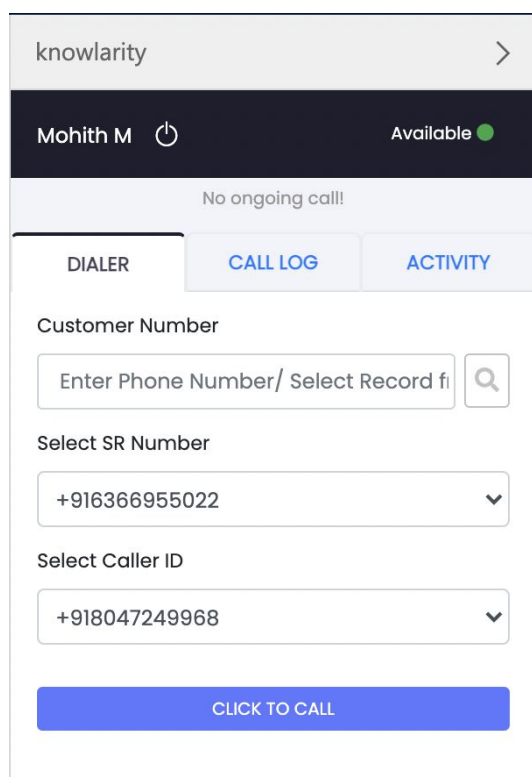
India : 1800-1020-340

UAE : (+971) 455-08-331

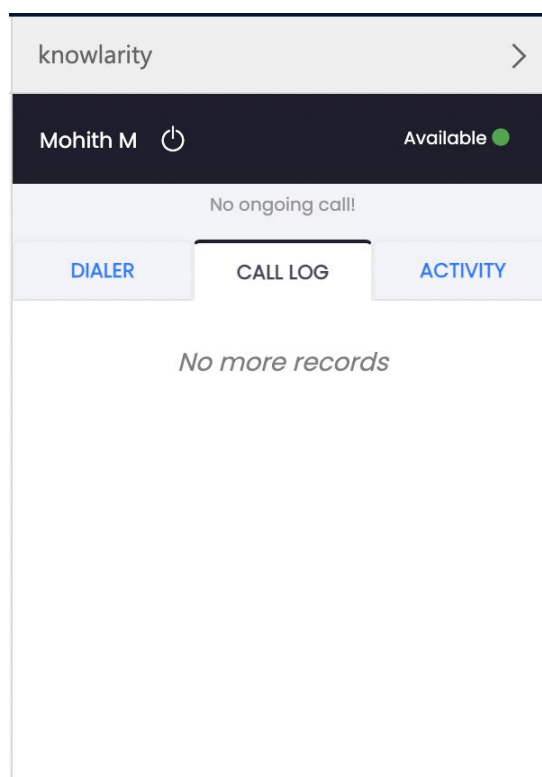
Tab Overview

There are three tabs in the plugin:

1. Dialer
2. Call logs
3. Activity



The screenshot shows the 'DIALER' tab selected. At the top, the user 'knowlarity' is logged in as 'Mohith M' with a status of 'Available'. Below this, a message states 'No ongoing call!'. The 'DIALER' tab is active, while 'CALL LOG' and 'ACTIVITY' are inactive. The form includes three fields: 'Customer Number' with a search icon, 'Select SR Number' with a dropdown menu showing '+916366955022', and 'Select Caller ID' with a dropdown menu showing '+918047249968'. A blue button labeled 'CLICK TO CALL' is at the bottom.



The screenshot shows the 'CALL LOG' tab selected. The header and status bar are identical to the Dialer tab. The 'CALL LOG' tab is active, while 'DIALER' and 'ACTIVITY' are inactive. The content area displays the message 'No more records'.



Dialer tab is to initiate calls to customers. It has 3 fields:

1. Customer Number : Input phone number to be dialer here
Also, the number can be searched in the Dynamics database by clicking on the search icon
2. Select SR Number : This is the Super Receptionist virtual number which can be selected from the dropdown
3. Select Caller ID: This is the Caller line identification number dropdown where the CLI number to be visible on the customer's phone can be selected here.

Call log tab displays the list of all the calls made by the agent from the Super Receptionist Dynamics plugin on that particular day.

Activity tab is to log the ongoing call activity into the dynamics CRM

knowlarity

Mohith M  Available 

No ongoing call!

DIALER


CALL LOG

ACTIVITY

Subject *


Call From *

Search



Call To *

Search




Phone Number

Description


Regarding

Search Accounts, Contacts, Leads, Cc




Priority

Select



Due



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
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Agent Status

Agent Status is only available for Super Receptionist Call Center accounts.

knowlarity >

gourav2 

Available 


No ongoing call!

DIALER


CALL LOG

ACTIVITY


Customer Number

Enter Phone Number/ Select Record from 

Select SR Number


+916366955022 


Select Caller ID


+918047249968 


CLICK TO CALL


knowlarity >

Status 


 Logged Out

 Available


 On Break

Enter Phone Number/ Select Record from 

Select SR Number

+916366955022 

Select Caller ID

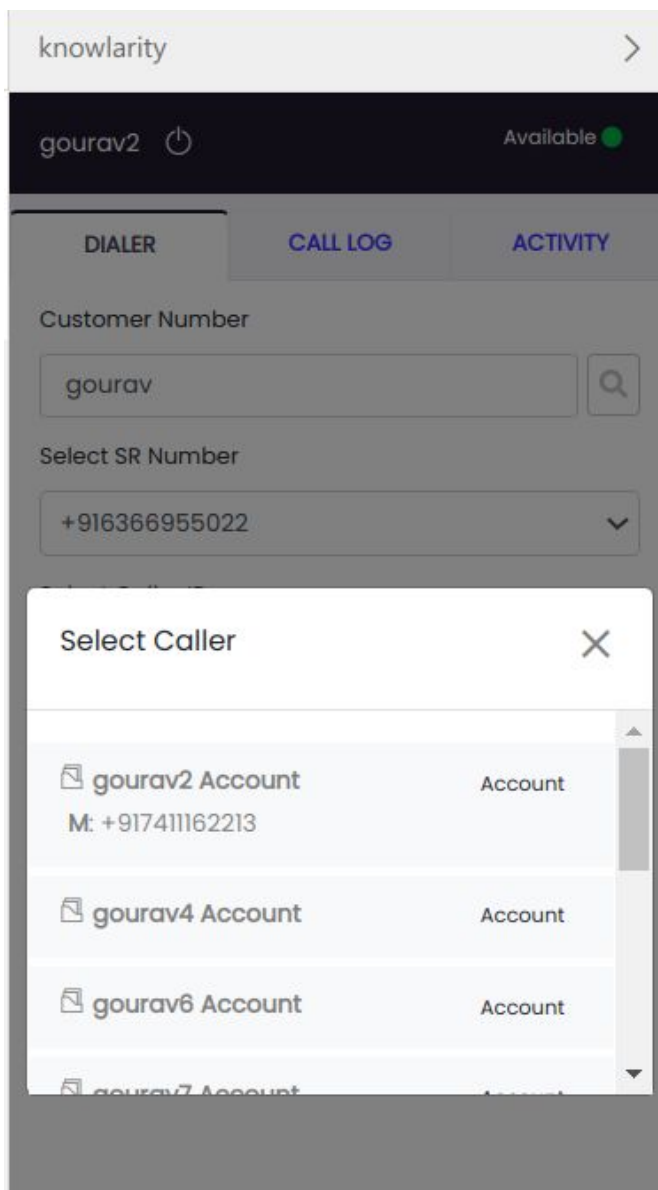
+918047249968 

CLICK TO CALL

Make Outbound Call

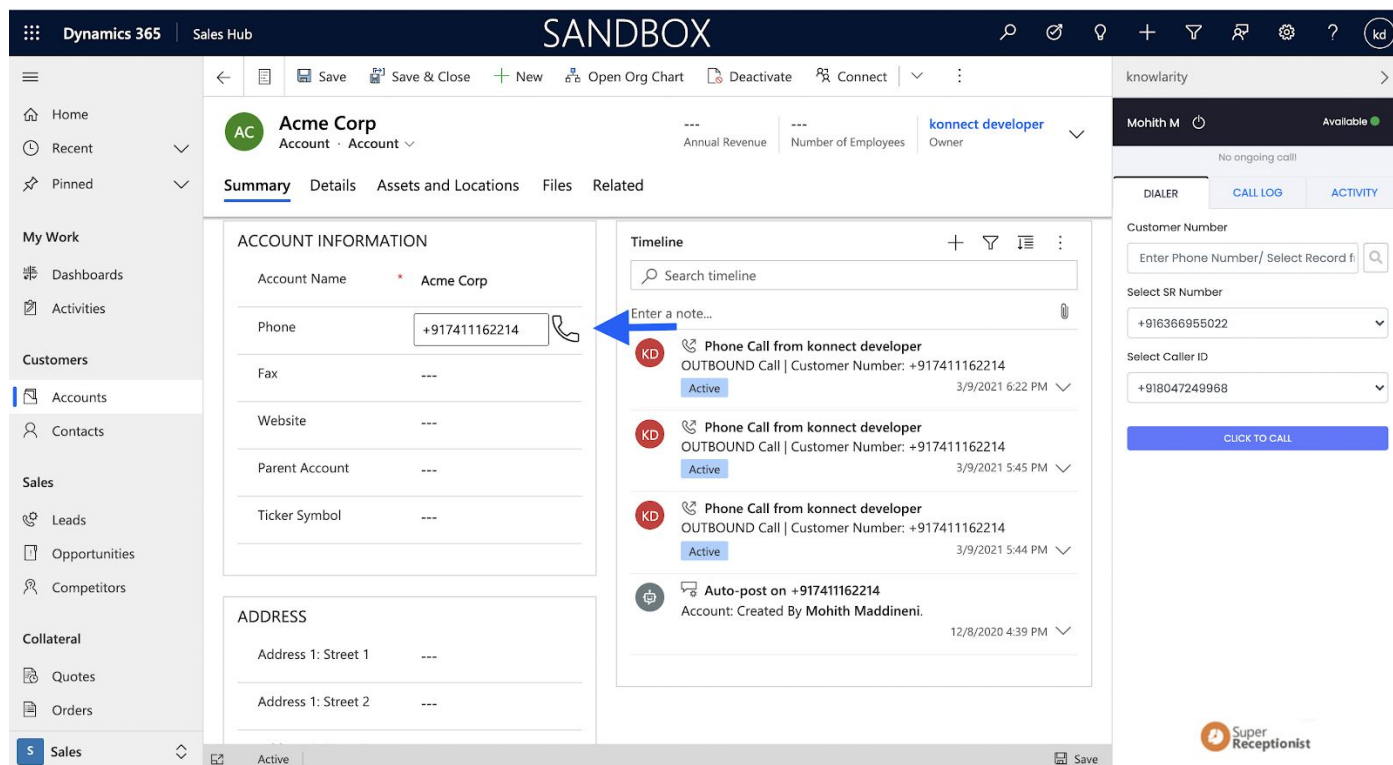
There are two ways to place an outbound call from the app

1. Using customer number - Type customer number in E164 format in customer number text field and click on '**Click to Call**' button
2. Using search -
 - Type name/email etc in customer text field in 'Dialer' tab
 - Click on search icon
 - Click on any search result
 - Select 'Click to Call' button



Click to Call from Dynamics records

Click on the 'Phone' icon against a standard phone field in the Dynamics 365 to make a call to that number.



The screenshot displays the Microsoft Dynamics 365 interface for a 'Sales Hub' account named 'Acme Corp'. The left navigation pane shows various sections like 'My Work', 'Customers', 'Sales', and 'Collateral'. The main area is divided into 'ACCOUNT INFORMATION' and 'ADDRESS' sections. The 'Phone' field in 'ACCOUNT INFORMATION' contains the number '+917411162214' and a phone icon. A blue arrow points to this icon. The 'Timeline' section on the right shows a list of activities, including 'Phone Call from konnect developer' and 'Auto-post on +917411162214'. The right sidebar shows the 'DIALER' tab with a 'CLICK TO CALL' button.

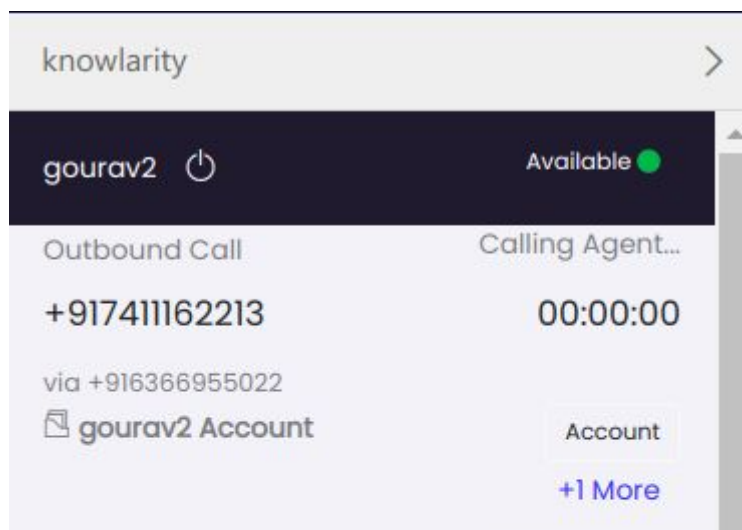
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Inbound Popup and live call tracking

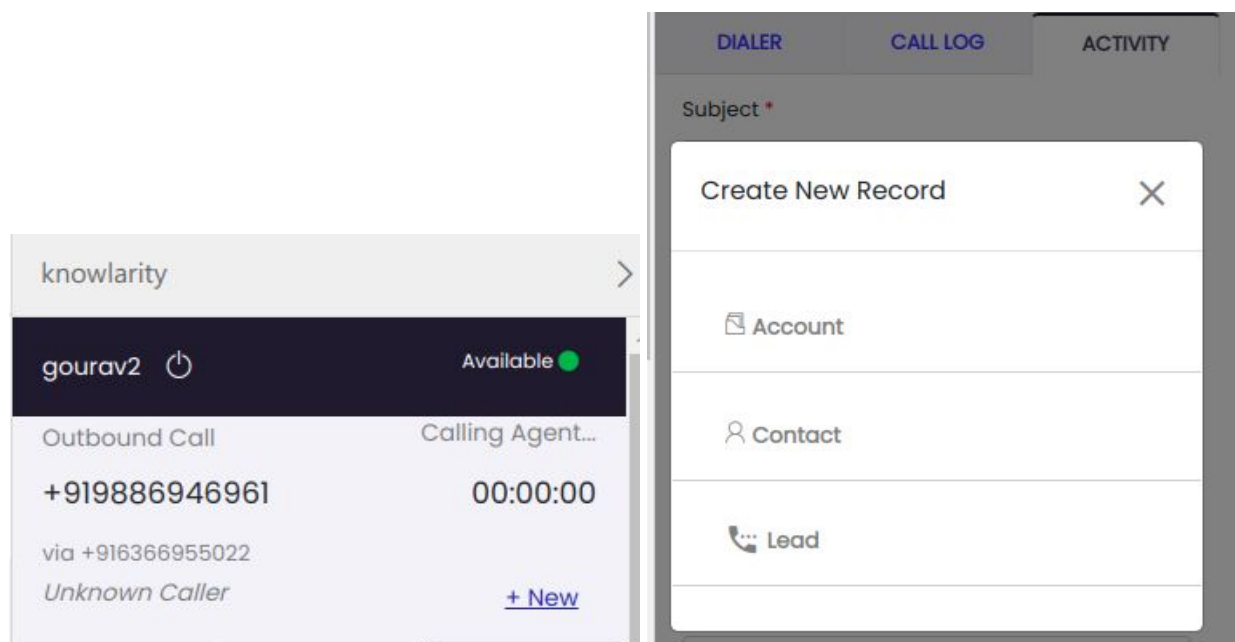
As the call progresses, agents can check the live status of the call. Refer below image.



If the customer phone number is associated with any record in the Dynamics, the associated lead/contact/account will be open and customer details will be shown in the plugin.

In case of new caller (If customer number is not associated with any record in the Dynamics), then

1. A lead/contact/account will be created automatically depending on the selected default action on the Super Receptionist Integration page
2. Agents can create lead/account/contact on clicking 'New'. (Please note that this is available only when default_action is 'None')



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Live action for ongoing call (Call Logging)


Agent can take an action on the fly for current ongoing calls


a. Create a new phone call activity

To increase agent's productivity, certain fields of phone call activity are auto-filled. Agent can change the content of any field and save the activity by clicking on 'Save Activity' button

b. Mark this as junk/spam by clicking on 'Skip & Don't Save'

No phone call activities/contacts will be created neither from plugin nor from backend (Knowlarity Server)

gourav2 

Available 

Outbound Call

Calling Agent...

+917411162213

00:00:00

via +916366955022

gourav2 Account

Account

+1 More

DIALER


CALL LOG

ACTIVITY


Subject *

Outbound Call | Customer Number: +917411162213

Call From *

konnnect developer X 

Call To *


gourav2 Account X 

Phone Number


+917411162213

Description

Regarding

Search Accounts, Contacts, Leads, Cas 

Priority



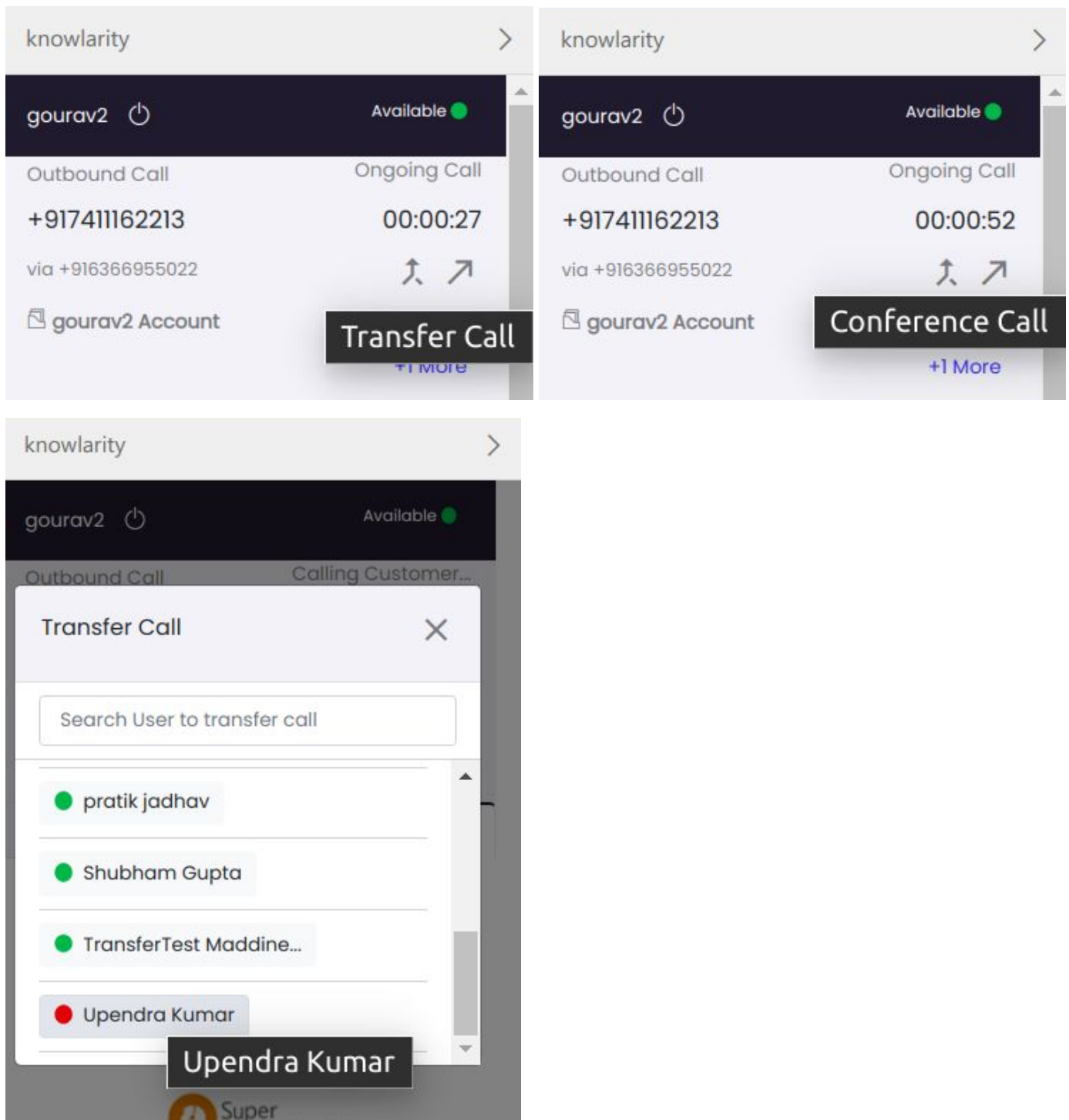
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Transfer and Conference

Once an agent and customer are connected, Agent can transfer calls to supervisor/other agents or add supervisor/other agents in the call.

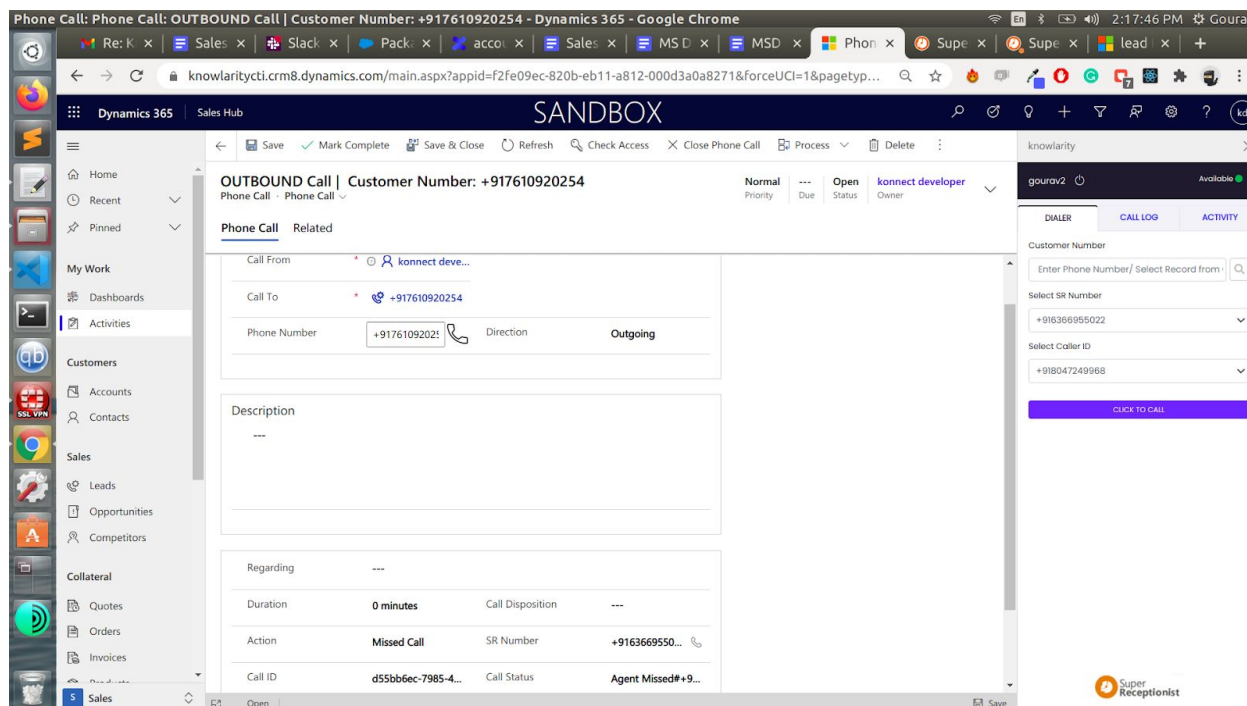


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Call Detail Record (CDR)



Phone Call: Phone Call: OUTBOUND Call | Customer Number: +917610920254 - Dynamics 365 - Google Chrome

knowlaritytycti.crm8.dynamics.com/main.aspx?appid=f2fe09ec-820b-eb11-a812-000d3a0a8271&forceUCI=1&pagetyp...

SANDBOX

OUTBOUND Call | Customer Number: +917610920254

Normal Priority | --- Due | Open Status | connect developer Owner

Phone Call | Related

Call From: * connect deve...

Call To: * +917610920254

Phone Number: +917610920254 | Direction: Outgoing

Description: ---

Regarding: ---

Duration	0 minutes	Call Disposition	---
Action	Missed Call	SR Number	+91636695502
Call ID	d55bb6ec-7985-4...	Call Status	Agent Missed#9...

gourav2 Available

DIALER | CALL LOG | ACTIVITY

Customer Number: Enter Phone Number/ Select Record from

Select SR Number: +916366955022

Select Caller ID: +918047249968

CLICK TO CALL

For every call that is made on SR number, a phone call activity with subject “<INBOUND/OUTBOUND> Call | Customer Number: {customer_number}>” will be created in Dynamics CRM and the activity will be associated with a lead/contact/account. The phone call activity contain following details :

1. Subject
2. Call From
3. Call To
4. Phone Number - caller/customer number
5. Direction - Incoming/Outgoing
6. Description - Call description/notes provided by agent in the cti app
7. Regarding - Existing lead/contact/account/case can be associated from the cti app

and below custom fields to record call data

1. Duration
2. Action
3. SR Number
4. Call Id
5. Call Status
6. Recording Url

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Troubleshooting

Q: *Where can I find recordings for calls?*

A: In case of a connected call, a call recording link will be available in the call activity. You will have to click on the link to download the recording and play using any media player.

Q: *Why duplicate records get created for the same caller/customer number?*

A: Record search is based on [E164 format](#) number. If a number is not saved in E164 format in records, a duplicate record will get created.

Q: *What is agent wrap up time?*

A: Agent wrap-up time is the time taken by an agent to make notes or entries about relevant details of a call after the caller has hung up. Agents must save activity within the agent wrap up time.

Q: *Why do I need to configure agent wrap up time?*

A: Agent wrap up time enables the Knowlarity server to respect agent actions taken at the plugin and the same activity is updated with call details which was created from the app.

Q: *Why are call details not getting updated in phone call activity real time?*

A: It is because of agent wrap up time. CDR starts processing only after the configured agent wrap up time. This enables knowlarity server to respect agent actions taken in the CTI App and pass call details to the same phone call activity created by the agent from the app.

Q: *Why is 'From' field not auto-filled with user details in the activity?*

A: Dynamics 365 users must update their number in their user profile.

Q: *Why is the activity tab closed before saving activity in the app?*

A: Agent must save activity within the agent wrap up time. Increase agent wrapup time if the time is not sufficient.

Q: *Why is there an error on changing agent status to 'On Break'?*

A: Custom Break is not yet supported from the plugin in Dynamics CRM. Check if custom break is enabled in your SuperReceptionist account.

Q: *Transfer/Conference is not happening even if there is success notification.*

A: IVR must have bridge dtmf enabled. Contact Knowlarity Support for further help.

Q: Why is the phone icon not visible for phone fields in the lead/contact/account page?

A: Phone icon will appear only next to the below mentioned fields:

1. Phone in account
2. Business Phone and Mobile Phone in lead
3. Business Phone and Mobile Phone in contact

Click to call from other phone fields is not yet available.

References

[Microsoft Channel Integration Framework](#)

[Microsoft OAuth](#)

[Microsoft Web Api Reference](#)