Microsoft Demo Installation and User Guide

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Introduction

InGenius® Connector Enterprise combines an existing phone system with Microsoft to help drive sales, marketing and customer service success. All the phone controls are embedded into Microsoft Dynamics 365 to improve an agent's efficiency with click-to-dial, screen-pop, call logging and screen transfer functions.

This document explains how to install and configure a Microsoft Dynamics 365 instance with InGenius Connector Enterprise and how to run a demo. All the steps to install and configure components are outlined in the **Configure Microsoft Dynamics 365** section. The **Demo System Guide** section directs a user through a sample demo of common features.

InGenius Connector Enterprise Demo

InGenius created an online Demo System that allows you to demonstrate the telephony capabilities of InGenius Connector Enterprise without the need of a telephone system at your location.

The Demo System uses a telephone system hosted at InGenius which accepts incoming calls and outgoing calls. Other complex scenarios can be executed such as using IVR information, entering a case number and having the related record popped.

Supported Platforms

The InGenius Demo System can be installed on the following operating systems and browsers:

Operating System	Browsers
Windows 10	Google Chrome Mozilla Firefox Microsoft Edge Microsoft Internet Explorer 11

Configure Microsoft Dynamics 365

This section explains how to configure a Microsoft Dynamics 365 instance to work with the InGenius Demo System. Use an administrator account to customize the system and configure users. The steps to follow are:

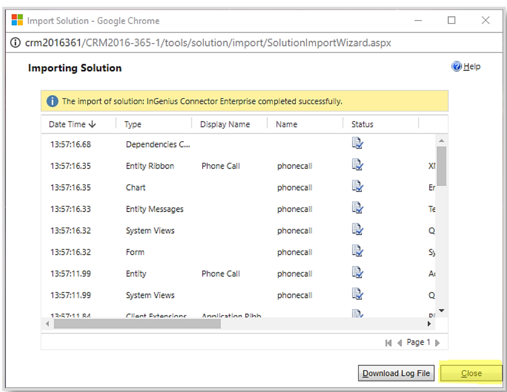
- Download the configuration file from InGenius.
- Install the Solution into Microsoft Dynamics 365.
- Configure a security role.
- Assign users to the security role.

Download the Files from InGenius

Download the InGenius configuration file for Microsoft Dynamics 365 located at http://go.ingenius.com/demopackagemsdynamics.

Install InGenius into Microsoft Dynamics 365

To connect the Microsoft Dynamics 365 instance with the InGenius Connector Enterprise Demo System, install the configuration file downloaded from InGenius. The Solution is imported into the instance and published.



1. Log into Microsoft Dynamics 365.
2. Select **Settings**.
3. Navigate to **Customization** | **Solutions**.
4. Click **Import**.
5. Select **Import** and **Choose File**, select the **InGeniusICECTISolution** file and click **Next**.
6. Click **Next** and select **Overwrite Customizations**.
7. Click **Import and** once successfully installed, click **Close**.

Configure Security Role

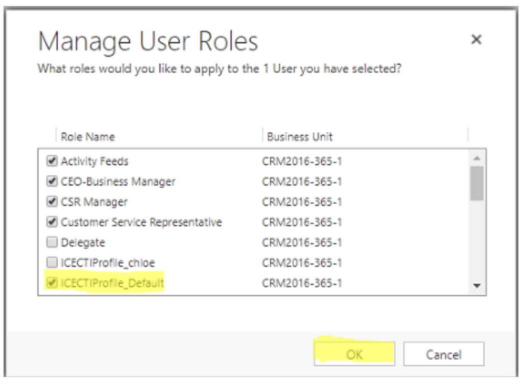
To assign users the ability to use InGenius Connector Enterprise Demo System, you need to create a Security Role inside the Microsoft Dynamics 365 org.

1. Log into Microsoft Dynamics 365.
2. Navigate to **Settings | Security**.
3. Click **Security Roles** and select **New**.
4. Click **New** to create a new security profile.
5. Enter the role name **ICECTIProfile_Default**.
6. Click **Save and Close**.

Assign Security Role

After the security role is created, agents need to be assigned to that role within the instance. Only assign users to this role who have signed up to use the InGenius Demo System.

1. Navigate to **Settings**.
2. Click **Administration**.
3. Click **Users**.
4. Select the user(s) you wish to assign to the InGenius CTI Profile.
5. Click **Manage User Roles**.
6. Select **ICECTIProfile_Default** and click **OK**.



Install the Channel Integration Framework for use with the Unified Interface

The Channel Integration Framework is only supported on Microsoft Dynamics 9.1 and higher within the Unified Interface. After the Channel Integration Framework is installed, navigate to any of the enabled Apps/Hubs to verify that InGenius loads in the Channel Integration Framework panel.

1. Login to your MS Dynamics Org.
2. Install the Channel Integration Framework from the App Source by navigating to **MSCRM 365** | **App Source** | **Channel Integration Framework** and click **Get it Now**.
3. Enter the Microsoft account credentials where the Channel Integration Framework is to be installed.
4. Enter the password and click **Sign In**.
5. After the Channel Integration Framework installs, you are redirected to the Dynamics 365 Administration Center page. Close this page.
6. Navigate to your **Microsoft Dynamics Org** | **Dynamics 365** menu and select Channel Integration Framework.
7. The Channel Integration Framework may take 5-20 minutes before it is visible.
8. Select **+ New** from the ribbon to add a new provider.
9. Enter the Channel Integration Framework configuration:

Label	Description
Name	**Name** of the channel provider e.g. InGenius_CIF.
Label	The **label** is displayed as the title on the widget e.g. InGenius.
Channel URL	The **URL** of the provider to host in the widget.e.g. https://[Dynamics Org Url]/WebResources/ingenius_/sidebar.html.
Enable Outbound Communication	Select **yes** to allow outbound calls or communication.
Channel Order	The **order** precedence of the channel providers which determines how the channels are displayed to the agents. 0 is the highest precedence.
API Version	The **version** of the Channel Integration Framework APIs.
Trusted Domains	Add **trusted** domains if communications between the channel URL and domain URL span across different domains.

10. Select the Unified Interface Apps for the Channel.
11. Select Roles for the Channel e.g. ICECTIProfile_Default. The security roles must already exist in Microsoft Dynamics Org.
12. Click **Save** to commit the changes.

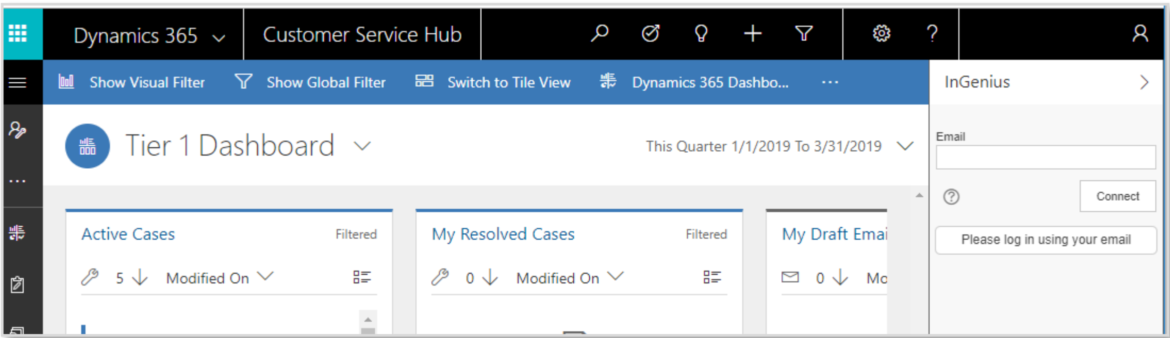
Demo System Guide

Once you have successfully installed the InGenius demo components, you are ready to start the demo. The demo steps take an agent through the steps of:

- Logon to the Demo System.
- Configure the agent's user interface (UI).
- Change the agent's state.
- Make outbound calls.
- Accept inbound calls.

Logon to the Demo System

This phone number may change on each logon attempt. It is important to verify the number each time at logon.



1. Enter the Email Address Provided on Sign up.
2. Click **Connect**.
3. The number to call into the Demo System is displayed beneath the Telephony dialog box.

Apply User Settings

The agent UI settings can be customized by accessing the **Settings** menu within the InGenius Connector Enterprise UI. To access the **Settings** menu, select the gear icon located on the bottom of the UI. After the settings have been configured, choose one of the following options:

- Click **Save** to close and save the settings.
- Click **Cancel** to exit out of settings without saving.

Summary of User Settings

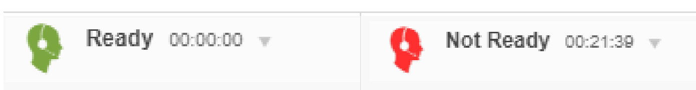
Open the Settings menu to access the configurable user settings outlined in the following table.

Connectivity	**Connect automatically**: The agent automatically connects to InGenius when they logon. The phone number can change on subsequent logons. **Auto-connect settings**: Displays the current connection information. **Disconnect Now**: Disconnects the agent from InGenius Connector Enterprise and their phone system.
Call Behavior	**Show shared calls**: Displays calls on shared lines. For the Demo System, there are no shared lines therefore this setting is not recommended. **Attempt screen pop** • **Never:** Do not pop the screen. • **On call ringing:** Screen pops when call is ringing. • **On call answered:** Screen pops once the call has been answered.

UI Settings	**Show number pad**: Select to show the number pad for numeric entry. **Jiggle Answer Button**: Select to jiggle the answer button on inbound calls. **Animate Button Spinners**: Select to have the buttons spin on calls.
Speed Dials	**Speed Dials** The default set of Speed Dials are programmed by the InGenius administrator but can be overridden with User settings unless locked. Locked Speed Dials are displayed with a lock symbol. Delete a speed dial by clearing the name and number fields. • **Use different colors**: Each speed dial displays in a unique color. • **Name**: Configure the name of the specified speed dial. • **Number**: Configure the number of the specified speed dial.
Call Log Templates	**Call Log Templates** The Call Log Templates are configured by the InGenius administrator to create standard subject and comments but can be overridden with User settings unless locked. Administrators can also enable a Read Only mode for specific templates, preventing users from modifying the Subject and Comments defined in the template.
Reset Settings	Click **Reset to Defaults** to clear all personal settings and restore to the default values.
Support	Displays your support number which is the unique identifier of the installation and other system details.

Agent States

Set the demo agent's state to **Ready** to receive calls from the Demo System. If an inbound call is placed with the agent state set to **Not Ready**, the call is placed into a queue to be answered by available agents.



The demo agent must change their state to **Ready** to receive calls inside Microsoft Dynamics 365. Click on the drop-down list at the top of the InGenius UI to change your agent state.

1. If the **Ready** state is selected**,** the agent is ready to accept calls and calls will ring at this extension.
2. If the **Not Ready** state is selected, the user is not ready to accept calls and calls will be routed to another agent. No agent receives calls are until they change their agent state to **Ready**.

Make Outbound Calls

When using the InGenius demo system all outgoing calls will be routed to the mobile phone or the number that has been registered with the InGenius Demo System.

There are several ways to place a call inside of Microsoft Dynamics 365 using InGenius Connector Enterprise: Click-to-dial, Search-and-dial, Call History, Speed Dial, and Manually Enter Digits.

Click-to-Dial

1. Within Microsoft Dynamics 365 all phone records can be selected to dial using your existing phone system.
2. Click on **Contacts** to show dialing from a list view.
3. Click on the entity to see more clickable phone links.

Search-and-Dial

1. Type a name or number in the tool bar at the top of the InGenius UI.
2. InGenius searches and displays any entities matching the name or numbered that was entered.
3. Click on the number from the list you want to dial.

Call History

1. Select the clock icon at the bottom of the UI to display the call history of up to 10 calls.
2. Click on any number in the history list.

Speed Dial

1. To see the speed dial number, hover over any of the speed dial buttons located under the dialing toolbar.
2. Click on one of the **Speed Dial** buttons to place an outbound call to the associated number.

Enter Digits Manually

1. Click the Dial pad icon to display the number pad or enter the digits in the toolbar.
2. Click the phone to initiate the connection.

In-Call Features

While a call is in progress the duration and the dialed number is displayed. Any phone features such as consult, transfer, hold, will depend on the integrated phone system. The Demo System supports hold and transfer.

Related Records

The highlighted record(s) will be associated to the saved Call Log. To open a related record, click on the icon.

Relate Current

During a call, entity records can be related using the **Relate Current** button.

1. Select **Relate Current** from the Call Actions menu.
2. Select the entities to relate to the current call.
3. The selected entities appear in the related records list.

New Entity 

During a call, new entity records can be created using the call information.

1. Select **New Entity** from the Call Actions menu.
2. Select the entity type you wish to create.
3. Once the record is saved, it will appear in the related records list.

You can select this new record to save the current call.

Call Log notes

1. Subjects and comments can be added to the call log by selecting one of the call log template buttons.
2. Additional comments can be added by clicking inside the comments box and typing the text comments.

Make Inbound Calls

All inbound calls will be directed through demo scenarios with IVR messaging and prompts. This number may be different each time you use the Demo System. Ensure you are calling the correct number.

The options are:

- “To demonstrate an incoming call with caller ID information press 1.”
- “To demonstrate an incoming call with caller ID information and IVR collected digits press 2.”
- “To demonstrate an incoming call with caller ID information, IVR collected digits and “transferred by” information press 3.”

Basic Inbound Call

1. Dial the **Please call into** number displayed in the **Telephony** dialog box.
2. Press 1 when prompted to simply call your Demo System.
3. Click **Answer** to see the inbound call and screen pop.

Inbound Call with Collected Digits

1. Dial the **Please call into** number displayed in the **Telephony** dialog box.
2. Press 2 when prompted to be passed onto Support.
3. You will be prompted "Please enter you support case number followed by #."
4. Type a **case number.** This number should be a short version of a case within your Dynamics instance. For example, to pop case CAS-01064-C1G0Z1, enter **01064#** at the prompt.
5. Click **Answer** and the entered digits are displayed in the Telephony dialog box and the appropriate case (if a matching case is found) will be popped on the agent's screen.

Call Transfer with IVR Collected Digits

This number may be different each time you use the Demo System. Ensure you are calling the correct number.

1. Dial the **Please call into** number displayed on the title bar.
2. Press 3 to route the call onto Sales then, transferred to support.
3. You will be prompted "Please enter your support case number followed by #."
4. Type a **case number.** This number should be a short version of a case within your Dynamics instance. For example, to pop case CAS-01064-C1G0Z1 you should enter **01064#** at the prompt.
5. Click **Answer** and the entered digits and transfer information are displayed in the Telephony dialog box and the appropriate case (if a matching case is found) will be popped on the agent's screen.