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Gplus Adapter for Microsoft Dynamics 365 Administrator's Guide

6/6/2026

Table of Contents

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Getting started

Contents

Concepts and procedures relevant to contact center administrators to implement the Gplus Adapter for Microsoft Dynamics 365.

The integrated solution presents a complete customer view allowing your contact center agents to service your customers.

See Prerequisites for Microsoft Dynamics 365 or Prerequisites for Microsoft Unified Service Desk (USD) for a list of the Adapter's preconditions and supported browsers.

Microsoft Dynamics 365 and Microsoft Unified Service Desk (USD)

The Gplus Adapter supports **Microsoft Dynamics 365 with Channel Integration Framework (CIF) versions 1.0** and **2.0** and **Microsoft Unified Service Desk (USD)** for the voice channel. This manual describes the standard functionality and notes those features where support for Microsoft USD or Dynamics 365 with CIF version 2.0 is different from Dynamics 365 with CIF version 1.0.

Customer Service workspace and Omnichannel for Customer Service

If you have configured Microsoft Dynamics 365 with Channel Integration Framework (CIF) version 2.0, the Gplus Adapter equally works with Customer Service workspace and Omnichannel for Customer Service. Since most customers use the first application, this manual will mainly refer to it as standard. However, their installation is exactly the same.

How do I install the Adapter in Microsoft Dynamics 365?

You can set up the Gplus Adapter by following the procedure described in Installation in Microsoft Dynamics 365.

How do I install the Adapter in Microsoft Unified Service Desk (USD)?

You can set up the Gplus Adapter by following the procedure described in Installation in Microsoft

Unified Service Desk (USD).

How do I access the Adapter?

Using the Microsoft Dynamics 365 **Channel Integration Framework (CIF)**, the Adapter is loaded and displayed during the Dynamics login sequence. Log in to your Microsoft Dynamics 365 account, then continue logging in to the Adapter with Genesys credentials.

Prerequisites for Microsoft Dynamics 365

Contents

Preconditions and browser requirements of the Gplus Adapter for Microsoft Dynamics 365 with CIF versions 1.0 or 2.0.

Prerequisites for CIF version 1.0

The Gplus Adapter for Microsoft Dynamics 365 is an integrated solution based on **Genesys** and Microsoft Dynamics 365, rendered within the **Microsoft Channel Integration Framework (CIF) version 1.0**.

The Adapter has the following prerequisites:

- **Engage Cloud** must be enabled.
- **Microsoft Dynamics 365 with CIF V1.0** must be installed.

> **Important**
> If you have not installed **Microsoft Dynamics 365 with the Channel Integration Framework (CIF)**, comply with the following external page's indications: How to get Dynamics 365 Channel Integration Framework version 1.0.

Browser support for CIF version 1.0

CIF V1.0 system requirements apply. The Adapter can be used with the following browsers:

- **Google Chrome**
- **Microsoft Edge**

To learn about the Adapter installation, continue to the Installation in Microsoft Dynamics 365.

Prerequisites for CIF version 2.0

The Gplus Adapter for Microsoft Dynamics 365 is an integrated solution based on **Genesys** and Microsoft Dynamics 365, rendered within the **Channel Integration Framework (CIF) version 2.0**. This CIF version is available with Customer Service workspace and Omnichannel for Customer Service.

The Adapter has the following prerequisites:

- **Engage Cloud** must be enabled.
- **Microsoft Dynamics 365 with CIF V2.0** must be installed.
- A multi-session app, such as **Customer Service workspace** or **Omnichannel for Customer Service** must be in use.

> **Important**
> If you have not installed **Microsoft Dynamics 365 with the Channel Integration Framework (CIF)**, comply with the following external page's indications: How to get Dynamics 365 Channel Integration Framework version 2.0.

> **Important**
> You can access the Customer Service workspace through the app selector by choosing the related app tile. You can also access the app in the Microsoft Dynamics 365 drop-down navigation in the upper-left corner.

Browser support for CIF version 2.0

CIF V2.0 system requirements apply. The Adapter can be used with the following browsers:

- **Google Chrome**
- **Chromium-based Microsoft Edge**

To learn about the Adapter installation, continue to the Installation in Microsoft Dynamics 365.

Installation in Microsoft Dynamics 365

Steps to install or update the Gplus Adapter in Microsoft Dynamics 365.

We assume that Microsoft Dynamics 365 has been configured with Channel Integration Framework (CIF) version 1.0 or 2.0 and that you own a Microsoft Dynamics 365 login with administrator privileges. For CIF version 2.0, we also assume that your organization uses either Customer Service workspace or Omnichannel for Customer Service.

> **Important**
> If you have already installed a **previous version of the Gplus Adapter** and want to update it, follow the same procedure below. Please note: it is essential that you **do not delete the previous Web Resources Zip File**.

This procedure explains how to deploy the Gplus Adapter Web Resources in Microsoft Dynamics 365. The package includes the following solution to be imported:

- **GplusD365forCIF.zip**

This managed solution implements the:

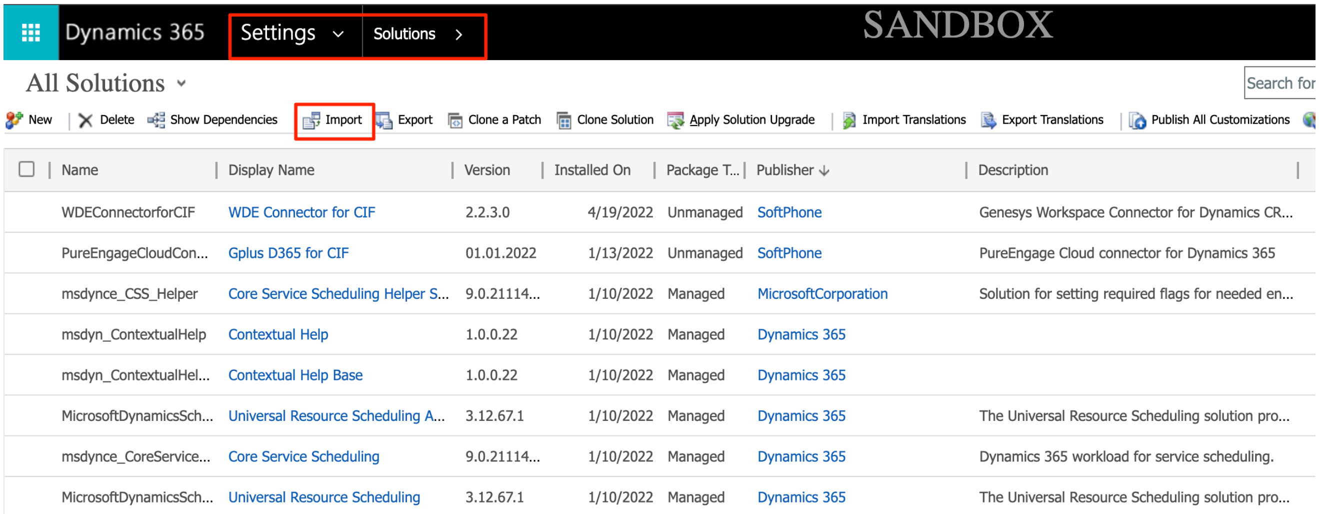
- Adapter core module,
- Out-of-the-box use case scenarios.

> **Important**
> The **GplusD365forCIF.zip** package enables both the Channel Integration Framework (CIF) version 1.0 and 2.0.

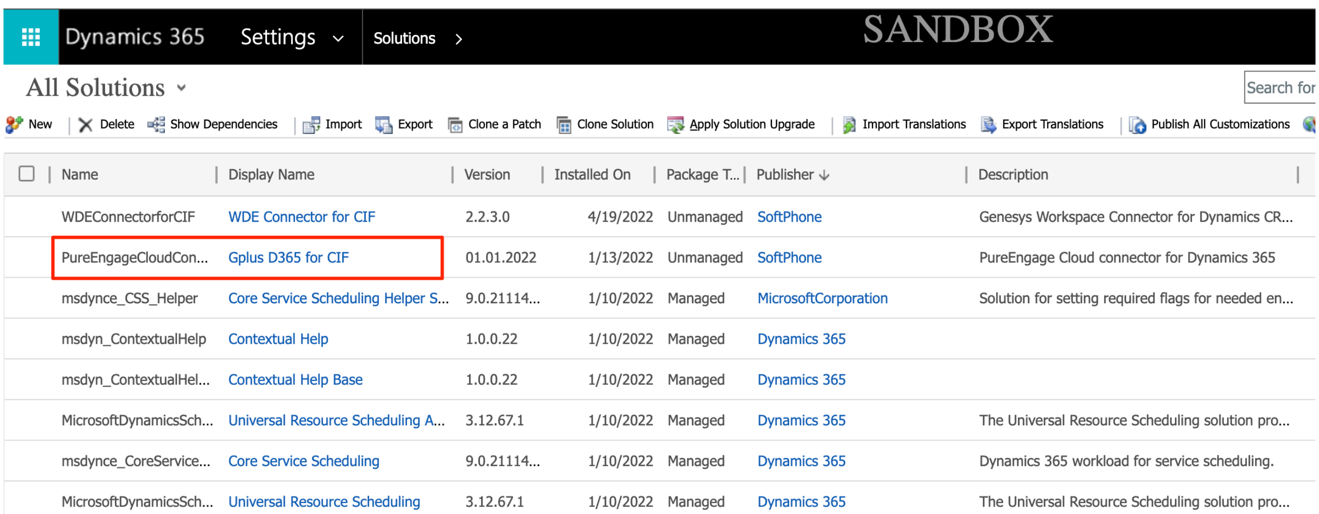
Installation steps:

1. Log in to Microsoft Dynamics 365 with administrator rights and go into **Settings**.
2. From Settings, go into **Solutions** and click the **Import** button.

3. Select the Web Resources Zip File (**GplusD365forCIF.zip**) to import it into the Microsoft Dynamics 365 environment.



After the importing of package will be show the new solution.



The Engage Cloud Adapter for CIF Zip File contains all CIF Adapter core files and use-case scenarios necessary for the implementation in Microsoft Dynamics 365. This zipped file includes the following objects/entities:

Option/Field Added	Entity Type	Description
Option Set	Voice	Storage of numerous types of interaction supported by the Adapter

Option/Field Added	Entity Type	Description
Fields	• Phone call • Task	Fields allowing the search for specific information related to the interactions within Genesys
JavaScript files		All JavaScript files used by the Adapter (for example iwscoremin.js), also known as JSDK

To see how to deploy an unmanaged solution, see Screen pops customization.

Configuration with Channel Integration Framework (CIF) version 1.0

Contents

Procedure to configure the Adapter with CIF V1.0.

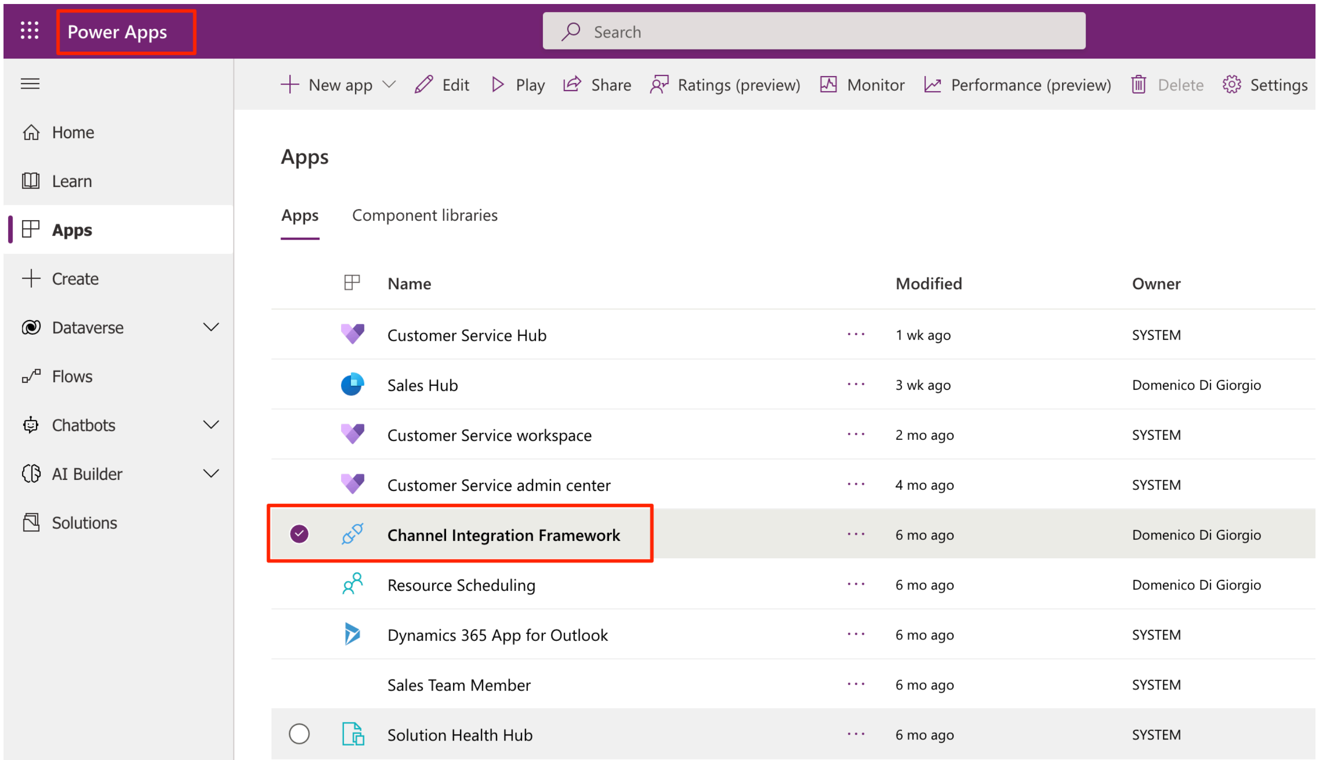
Introduction

If you have already installed the Gplus Adapter, the following procedure explains how to configure the Microsoft Dynamics 365 Channel Integration Framework (CIF) application version 1.0.

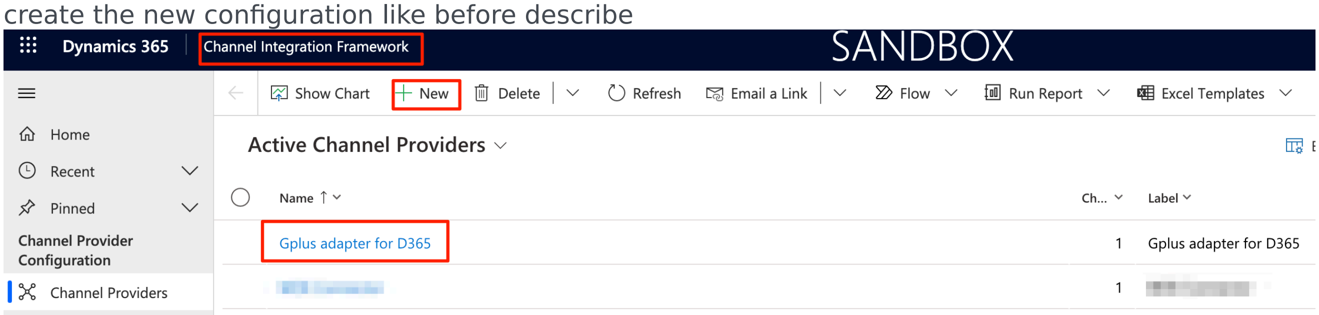
> **Important**
> Before proceeding with the following steps, make sure your Microsoft Dynamics 365 has been configured with **Channel Integration Framework (CIF) version 1.0**. If it has not, comply with the following external page's indications: How to get Dynamics 365 Channel Integration Framework.

1. Open the CIF application by clicking the Microsoft Dynamics 365 **list menu** and selecting **Channel Integration Framework**.
2. Create a new channel provider by clicking **+ New**.
3. Provide the following parameters:
    - **Name:** any name
    - **Label:** Gplus Adapter for MS Dynamics 365
    - **Channel URL:** https:///webresources/softphon_index_wwe.html
    - **Enable Outbound Communication:** Yes/No
    - **Channel Order:** 1
    - **API Version:** 1.0
    - **Trusted Domain:**
    - **Custom Parameters:** {"InstanceURL": "", "Logo": "/webresources/softphon_microsoft.png", "Width": 470}

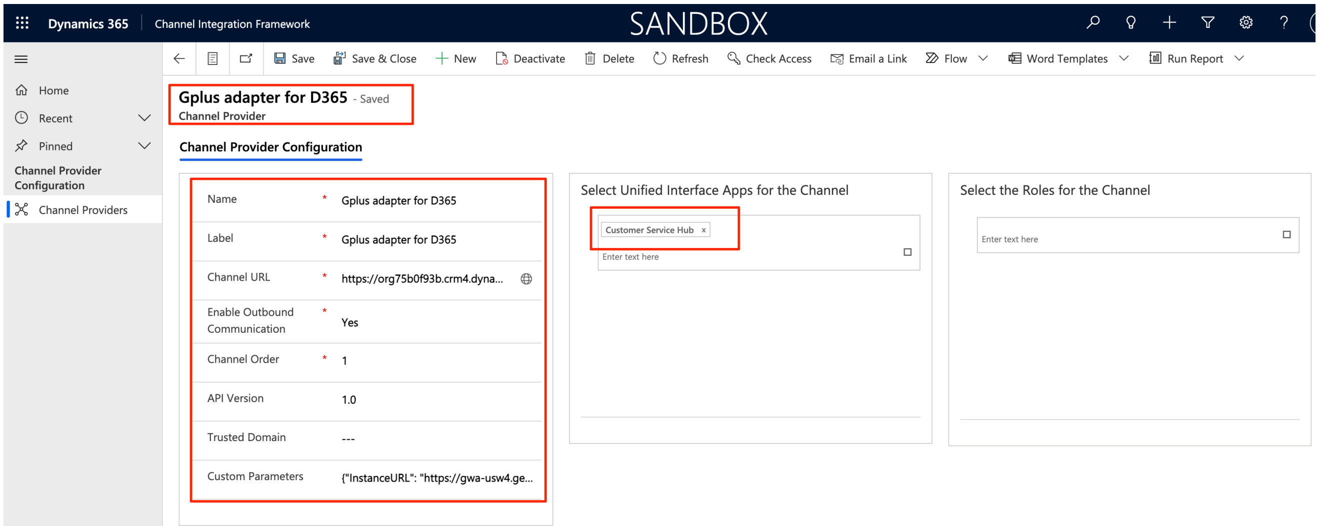
Select the channel integration framework application



create the new configuration like before describe



and complete all fields.



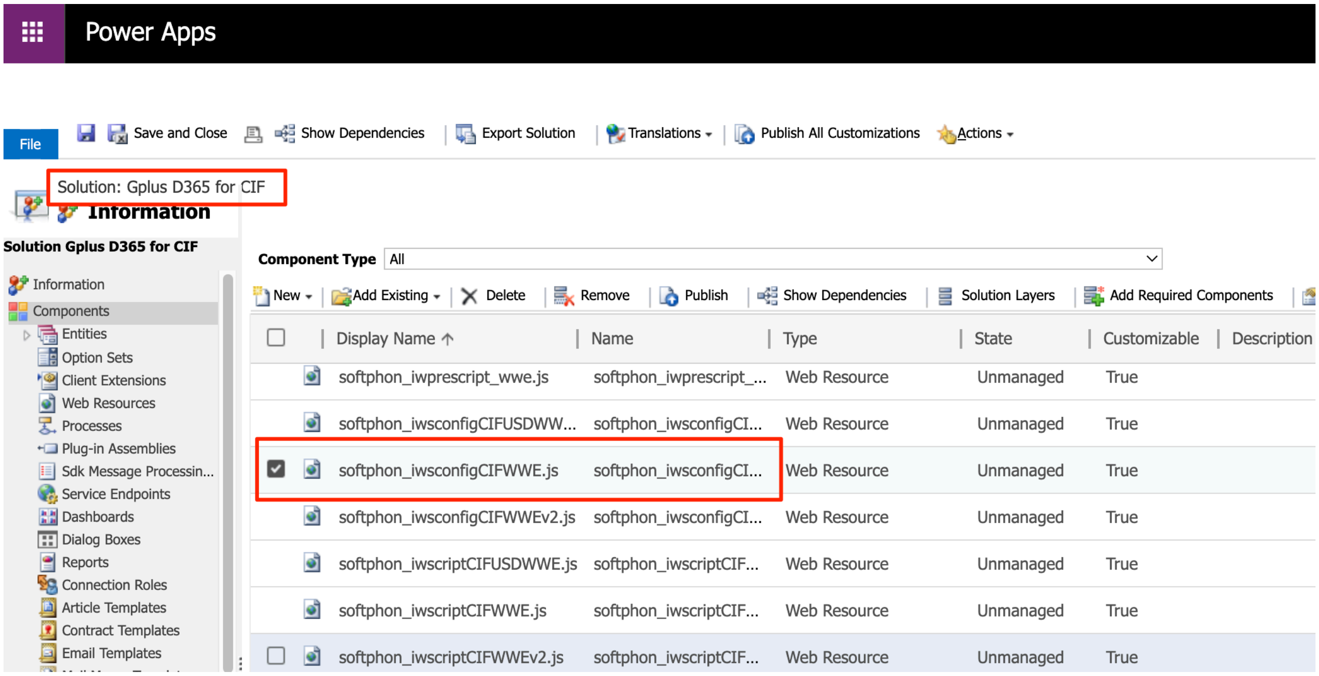
> **Important**
> When filling out the **Channel URL** field, you have to replace with your own Microsoft Dynamics 365 domain.

> **Important**
> When filling out the **Custom Parameters** field, you have to replace with your own (for example "https://gwa-usw4.genesyscloud.com/ui/wwe/api.js"). Please not that it is important to include the full path to api.js toolkit api javascript library.

Configuring logo and menu buttons

The following procedure explains how to configure the **softphon_iwsconfigCIFWWE.js JavaScript file**:

1. Select the Web Resources Zip File (**GplusD365forCIF.zip**).
2. Open **softphon_iwsconfigCIFWWE.js**:



in the popup copy and mofify the code below like you prefer

```
var params = {
context: this,
integrationType: "wwe",
layoutType: "widget",
stylePath: "/webresources/softphon_wwe_mainstyle.css",
instance: window.Softphone.InstanceURL,
layoutPath: "/webresources/softphon_wwe_mainui.html",
branding: window.Softphone.Logo,
plugins: [
{ path: "/webresources/softphon_wwe_mainui.js",
className: "mainui",
objectName: "mainui",
parameters: { "topView": "CommunicatorView"}
},
{ path: "/webresources/softphon_wwe_interactionbar.js",
className: "interactionbar",
objectName: "interactionbar",
parameters: { "TOOLTIP": { "voice": "callType,direction,call.state,call.phoneNumber"} }
}
]
};log.setLogLevel(enumloglevel.debug);
$(document).ready(function(){
iwscore.initCTI(params);
iwscore.enableCTI();
});
```

Key	Value	Description
branding	default: window.Softphone.Logo possible value: any valid logo web resources (for example "/webresources/softphone_microsoft.png")	default: logo is retrieved from CIF configuration possible value: path where the file name is stored

Key	Value	Description
topView	default: CommunicatorView possible value: CommunicatorView, PerformanceTrackerView	possibility to visualize menu buttons outside the list menu

If you are interested in screen pop configuration, check Screen pops configuration.

Configuration with Channel Integration Framework (CIF) version 2.0

Contents

Procedure to configure the Adapter with CIF V2.0.

Introducation

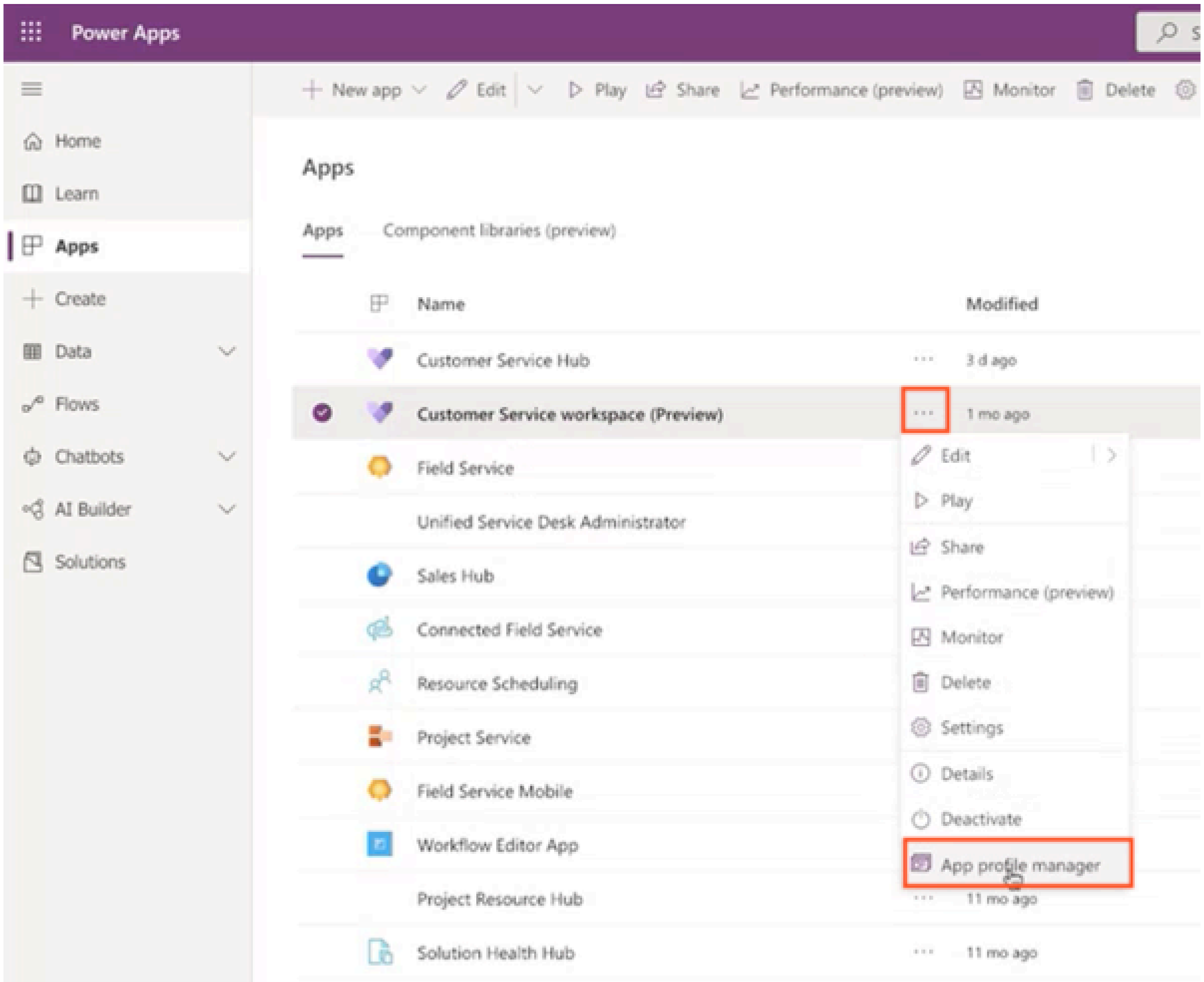
If you have already installed the Gplus Adapter, the following procedure explains how to configure the Microsoft Dynamics 365 Channel Integration Framework (CIF) application version 2.0.

> **Important**
> The Gplus Adapter equally works with Customer Service workspace and Omnichannel for Customer Service.

> **Important**
> Since most users have the **Customer Service workspace**, this manual will mainly refer to it as standard. However, the two applications' configuration is exactly the same.

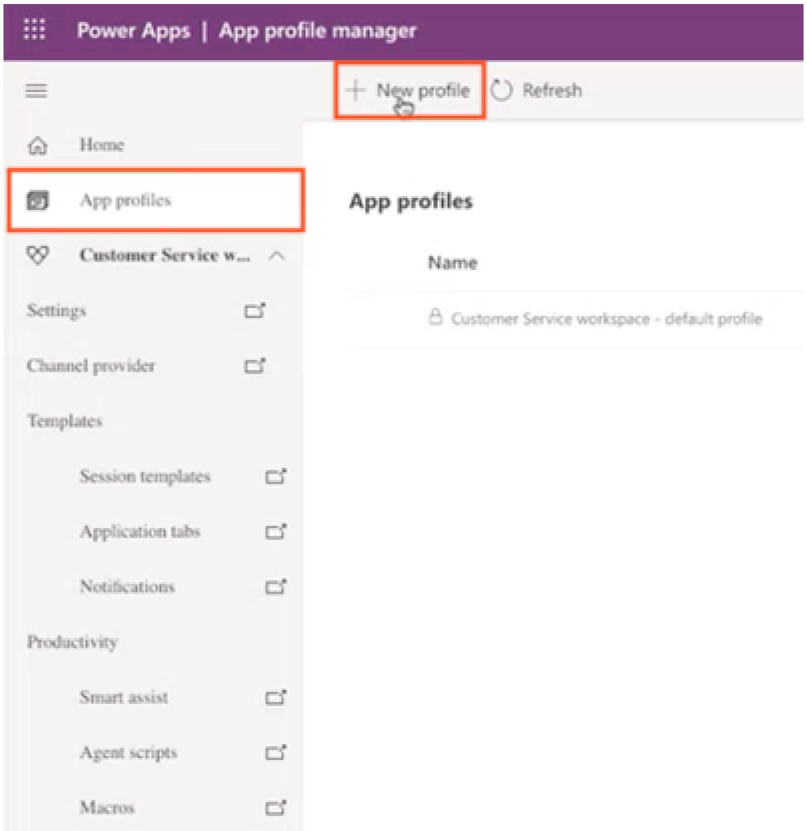
> **Important**
> Before proceeding with the following steps, make sure your Microsoft Dynamics 365 has been configured with **Channel Integration Framework (CIF) version 2.0**. If it has not, comply with the following external page's indications: How to get Dynamics 365 Channel Integration Framework.

- Navigate to the Make Power Apps website and log in with the same system administrator's credentials.
- In the upper right, set the environment where you want to enable the Adapter.
- Select **Apps** in the left-hand menu.
- Click the **three-dot icon** next to Customer Service workspace and choose **App profile manager** from the menu.



> **Important**
>
> If both Customer Service workspace and Omnichannel for Customer Service are enabled, both will be listed. All links available in the related drop-down menus will lead to the same URLs because the set-up procedure is exactly the same.

- Click **App profiles** in the left-hand menu, then **+ New profile**.

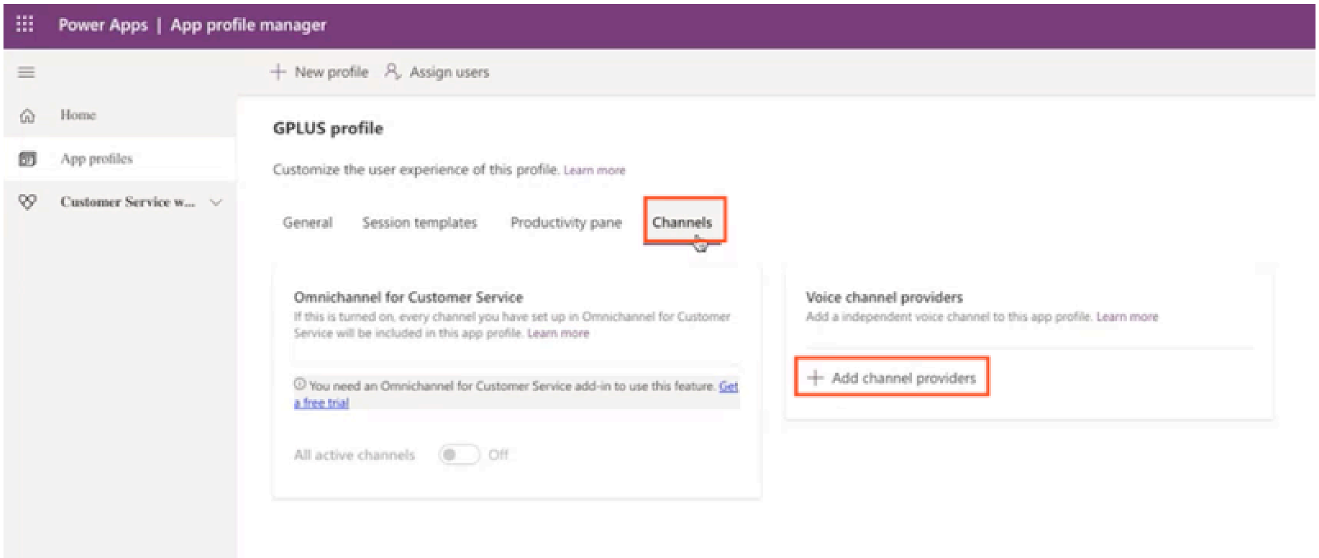


- Fill the form displayed on the right as follows, the click **Save**:
  - **Name:** any name
  - **Unique name:** _anyname

Important

is an example of how the profile can be named. When filling out the **Unique name** field, you have to replace with your organization name.

- Click the new profile to open it and select the **Channels** tab.
- Click **+ Add channel providers** in the Voice channel providers box, then select **Create a new channel provider in Unified Interface**, which will open in a new tab.



Important

A box might appear and invite you, once you are done in the Unified Interface, to return to the profile created and complete the setup.

- Provide the following parameters:
  - **Name:** any name
  - **Unique Name:** _anyname
  - **Label:** Gplus Adapter for MS Dynamics 365
  - **Channel URL:** https:///webresources/softphon_CIFWWEv2.html
  - **Enable Outbound Communication:** Yes/No
  - **Channel Order:** 1
  - **API Version:** 2.0
  - **Trusted Domain:**
  - **Custom Parameters:** {"InstanceURL": , "Logo": "/webresources/softphon_microsoft.png", "Width": 470}
  - **Enable Analytics:** Yes/No

Important

is an example of how the profile can be named. When filling out the **Unique name** field, you have to replace with your organization name.

> **Important**
>
> When filling out the **Channel URL** field, you have to replace with your own Microsoft Dynamics 365 domain.

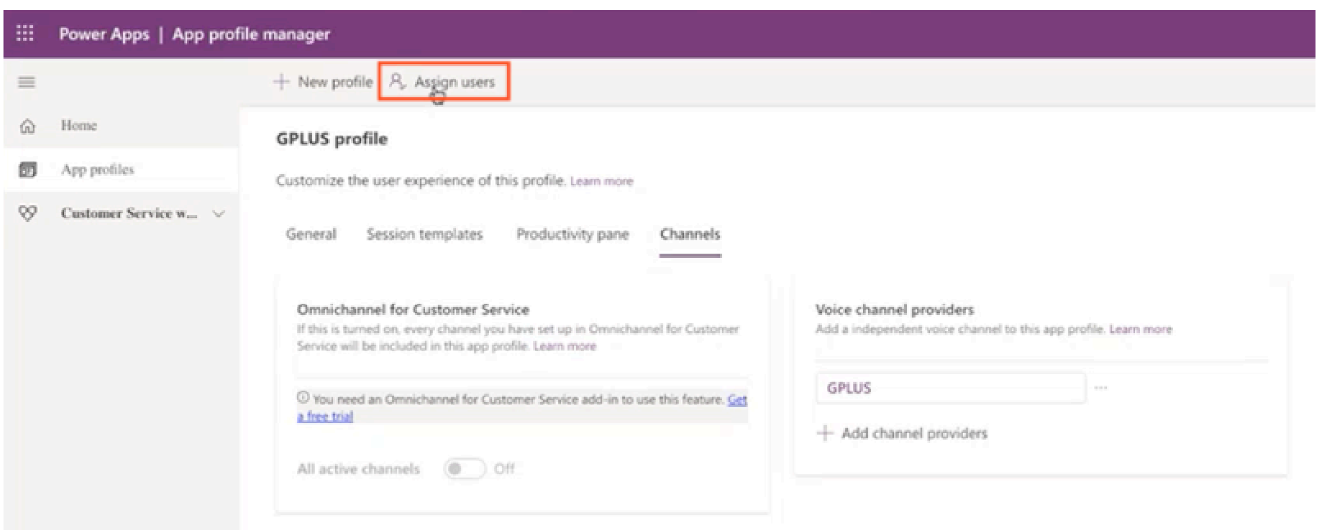
> **Important**
>
> When filling out the **Custom Parameters** field, you have to replace with your own (for example "https://gwa-usw4.genesyscloud.com/ui/wwe/api.js"). Please not that it is important to include the full path to api.js toolkit api javascript library.

- **Save** and go back to **App Profiles** in Power Apps.
- Click again **+ Add channel providers** in the **Voice channel** providers box, then start typing your provider's name and it will be displayed. Click it and it will automatically be saved.

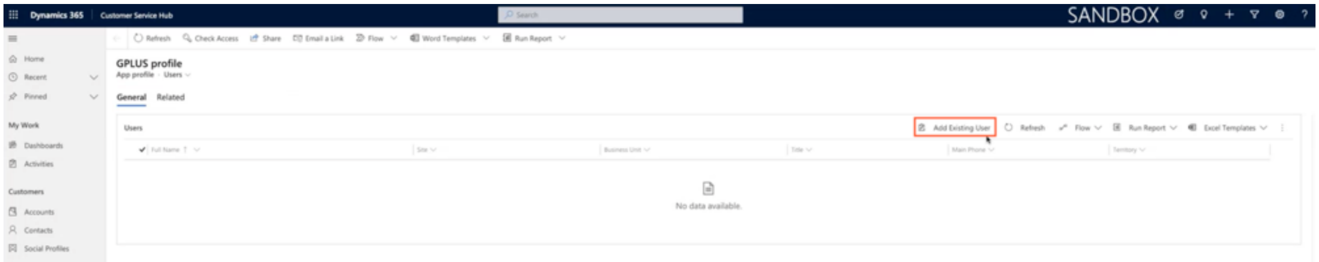
Assigning users to the new provider

While previously one could choose a security role for each user, now you have to assign specific users to the provider you have just created:

- Click **Assign users** on the upper menu. The Unified Interface will open in a new tab.



- Select **Add Existing User** and leverage the lookup function to select them, then click **Add**. All selected users will be displayed in the App profile’s **General** tab.



Important

When users open the Customer Service workspace (or Omnichannel for Customer Service), the system verifies if they have a specific App profile. If so, it will check to which provider it is associated and will display the Gplus Adapter for Microsoft Dynamics 365.

Configuring logo and menu buttons

The following procedure explains how to configure the **softphon_iwsconfigCIFWWEv2.js JavaScript file**:

- Select the Web Resources Zip File (**GplusD365forCIF.zip**).
- Open **softphon_iwsconfigCIFWWEv2.js**:

```
var params = {
context: this,
integrationType: "wwe",
layoutType: "widget",
stylePath: "/webresources/softphon_wwe_mainstyle.css",
instance: window.Softphone.InstanceURL,
layoutPath: "/webresources/softphon_wwe_mainui.html",
branding: window.Softphone.Logo,
plugins: [
{ path: "/webresources/softphon_wwe_mainui.js",
className: "mainui",
objectName: "mainui",
parameters: { "topView": "CommunicatorView"}
},
{ path: "/webresources/softphon_wwe_interactionbar.js",
className: "interactionbar",
objectName: "interactionbar",
parameters: { "TOOLTIP": { "voice": "callType,direction,call.state,call.phoneNumber"} }
}
]
};log.setLogLevel(enumloglevel.debug);
$(document).ready(function(){
iwscore.initCTI(params);
iwscore.enableCTI();
```

```
});
```

Key	Value	Description
branding	default: window.Softphone.Logo possible value: any valid logo web resources (for example "/webresources/softphone_microsoft.png")	default: logo is retrieved from CIF configuration possible value: path where the file name is stored
topView	default: CommunicatorView possible value: CommunicatorView, PerformanceTrackerView	possibility to visualize menu buttons outside the list menu

If you are interested in screen pop configuration, check Screen pops configuration.

Importing Configuration Data

In the configuration with the Channel Integration Framework (CIF) version 2.0, JavaScript files are not enough: the Gplus Adapter also needs the Configuration Data offered by Microsoft (**Session templates** and **Application tabs**) required by users to design the desired graphic interface.

Import the following package through the Data Migration Utility Tool:

- **GplusD365forCIF_USD_9_0_003_00_ConfigurationData**.

Once you have imported the package, the Tool will create Application tabs under the Active Session Templates.

> **Important**
> To install or download the **Data Migration Utility Tool**, follow the indications provided at the following external page: Download tools from NuGet.

Once you have imported the package, the Tool will create Application tabs under the Active Session Templates.

Packages

Download the Gplus Adapter for Microsoft Dynamics package here.

To download the Gplus Adapter for Microsoft Dynamics package, click the following link:

- Gplus-Adapter-Microsoft Dynamics 9.1.001

Prerequisites for Microsoft Unified Service Desk (USD)

Contents

Preconditions and browser requirements for the Gplus Adapter for Microsoft Dynamics 365 Desktop Application with CIF versions 1.0 or 2.0.

Prerequisites

The Gplus Adapter for Microsoft Dynamics 365 is an integrated solution based on **Genesys** and Microsoft Unified Service Desk (USD), rendered within the **Channel Integration Framework (CIF)**.

The Adapter has the following prerequisites:

- **Engage Cloud** must be enabled.
- **Microsoft USD** must be installed.

Browser support for CIF version 1.0

CIF V1.0 system requirements apply. The Adapter can be used with the following browsers:

- **Google Chrome**
- **Microsoft Edge**

To learn about the Adapter installation, continue to the Installation in Microsoft Unified Service Desk (USD).

Browser support for CIF version 2.0

CIF V2.0 system requirements apply. The Adapter can be used with the following browsers:

- **Google Chrome**
- **Chromium-based Microsoft Edge**

To learn about the Adapter installation, continue to the Installation in Microsoft Unified Service Desk (USD).

Installation in Microsoft Unified Service Desk (USD)

Steps to install or update the Gplus Adapter in Microsoft Unified Service Desk (USD).

We assume that Microsoft Unified Service Desk (USD) has been configured with Channel Integration Framework (CIF) version 1.0 or 2.0 and that you own a Microsoft Dynamics 365 login with administrator privileges.

> **Important**
> If you have already installed a **previous version of the Gplus Adapter** and want to update it, follow the same procedure below. Please note: it is essential that you **do not delete the previous Web Resources Zip File**.

This procedure explains how to deploy the Gplus Adapter Web Resources in Microsoft USD. The package includes the following solution to be imported:

- **GplusD365forCIF_USD_ConfigurationData.zip**

This managed solution implements the:

- Adapter core module,
- Out-of-the-box use case scenarios.

Installation steps:

1. Log in to Microsoft Dynamics 365 with administrator rights and go into **Settings**.
2. From Settings, go into **Solutions** and click the **Import** button.
3. Select the Web Resources Zip File (**GlusD365forCIF_USD_ConfigurationData.zip**) to import it into the Microsoft Dynamics 365 environment.
4. To import Microsoft USD configuration data to the Microsoft CRM instance, use the **Configuration Migration tool** available into the CRM SDK Development Package (SDK\Tools\ConfigurationMigration folder of the CRM package.exe).

Important

Details about importing configuration data (**GplusD365forCIF_USD_ConfigurationData.zip**) are available on the following external page: About configuration data.

The Engage Cloud Adapter for CIF Zip File contains all CIF Adapter core files and use-case scenarios necessary for the implementation in Microsoft USD. This zipped file includes the following objects/ entities:

Option/Field Added	Entity Type	Description
Option Set	Voice	Storage of numerous types of interaction supported by the Adapter
Fields	• Phone call • Task	Fields allowing the search for specific information related to the interactions within Genesys
JavaScript files		All JavaScript files used by the Adapter (for example iwscoremin.js), also known as JSDK

To see how to deploy an unmanaged solution see Screen pops customization.

Configuration in Microsoft Unified Service Desk (USD)

Contents

Procedure to configure the Adapter with Microsoft USD.

If you have already installed the Gplus Adapter, the following procedure explains how to configure the Microsoft USD application.

> **Important**
> Before proceeding with the following steps, make sure your Microsoft Dynamics 365 has been configured with **Channel Integration Framework (CIF) version 1.0 or 2.0**. If it has not, comply with the following external page's indications: How to get Dynamics 365 Channel Integration Framework.

Configuration steps:

1. Open the Microsoft Dynamics 365 application and click **Settings**, then **Unified Service Desk**.
2. Select **Hosted Control** and go to **Gplus CIF Adapter**.
3. Provide the following parameters:
    - **Sort Order:** any value
    - **Unified Service Desk Component Type:** Channel Integration Framework
    - **Hosting Type:** Chrome Process
    - **Custom Parameters:** https://webresources/softphon:CIFWWEUSD.html?data={"InstanceURL": "", "CustomFlow": true, "CustomerPrefix": "softphon", "MakeCall": true, "Logo": "/webresources/softphon_microsoft.png"}

> **Important**
> When filling out the **Custom Parameters** field, you have to replace with your own (for example "https://gwa-usw4.genesyscloud.com/"). The same applies to **Customer Prefix** if required.

Configuring logo and menu buttons

The following procedure explains how to configure the **softphon_iwsconfigCIFUSDWWE.js JavaScript file**:

1. Select the Web Resources Zip File (**GplusD365forCIF.zip**).

2. Open **softphon_iwsconfigCIFUSDWWE.js**:

```
var params = {
context: this,
integrationType: "wwe",
layoutType: "widget",
stylePath: "/webresources/softphon_wwe_mainstyle.css",
instance: window.Softphone.InstanceURL,
layoutPath: "/webresources/softphon_wwe_mainui.html",
branding: window.Softphone.Logo,
plugins: [
{ path: "/webresources/softphon_wwe_mainui.js",
className: "mainui",
objectName: "mainui",
parameters: { "topView": "CommunicatorView"}
},
{ path: "/webresources/softphon_wwe_interactionbar.js",
className: "interactionbar",
objectName: "interactionbar",
parameters: { "TOOLTIP": { "voice": "callType,direction,call.state,call.phoneNumber"} }
}
]
};log.setLogLevel(enumloglevel.debug);
$(document).ready(function(){
iwscore.initCTI(params);
iwscore.enableCTI();
});
```

Key	Value	Description
branding	default: window.Softphone.logo possible value: any valid logo web resources (for example "/webresources/softphone_microsoft.png")	default: logo is retrieved from CIF configuration possible value: path where the file name is stored
topView	default: CommunicatorView possible value: CommunicatorView, PerformanceTrackerView	possibility to visualize menu buttons outside the list menu

If you are interested in screen pop configuration, check Screen pops configuration.

Screen pops functioning

Contents

Screen pops display a relevant record from Microsoft Dynamics 365 or Microsoft USD when agents receive or make calls.

The out-of-the-box use cases are deployed with the managed solution, as described in the Gplus installation in Microsoft Dynamics 365 or in Microsoft USD. However, if they do not fit your requirements, you can customize them. To learn more on this topic, see Screen pops customization.

How screen pop records are retrieved

Before you manage and customize screen pops, get familiar with how screen pop records are selected and displayed to agents. Here is how they typically work in an out-of-the-box scenario.

When a call is established, a search based on the **Automatic Number Identification (ANI)** is automatically launched. If an associated contact is found, a screen pop is triggered inside Microsoft Dynamics 365 or Unified Service Desk (USD): the contact detail form opens and displays the data. Simultaneously, an **Activity History of type Call** containing all information about that inbound our outbound interaction is automatically created in Dynamics or USD and made available on the related contact's landing page.

See Activity History workings to learn more about these records.

Screen pops configuration

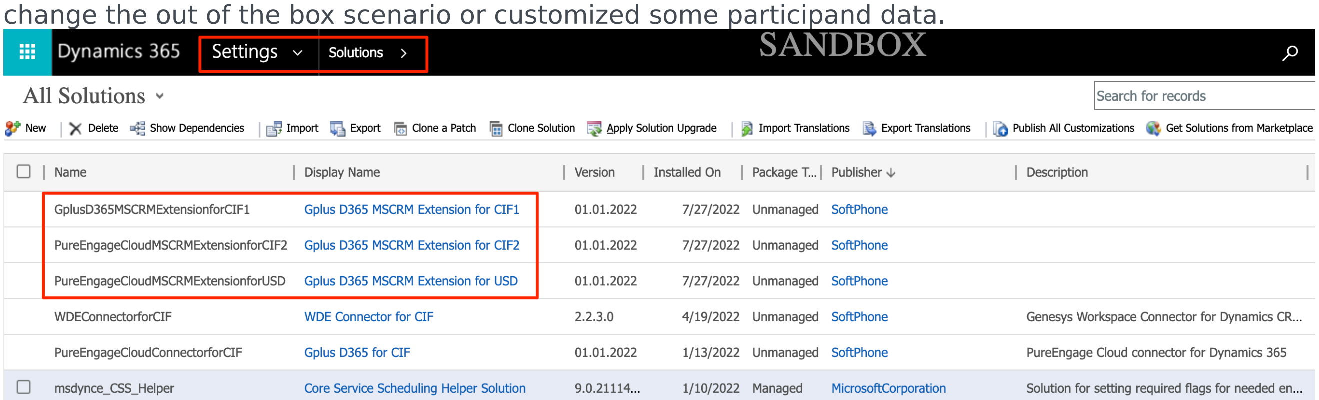
Contents

Steps to configure screen-pops in Microsoft Dynamics 365 with CIF versions 1.0 or 2.0 or Microsoft USD.

Import Extension Solution

Customization can be deployed as an **unmanaged solution**. According to the Microsoft environment you are using, it is based on different JavaScript files.

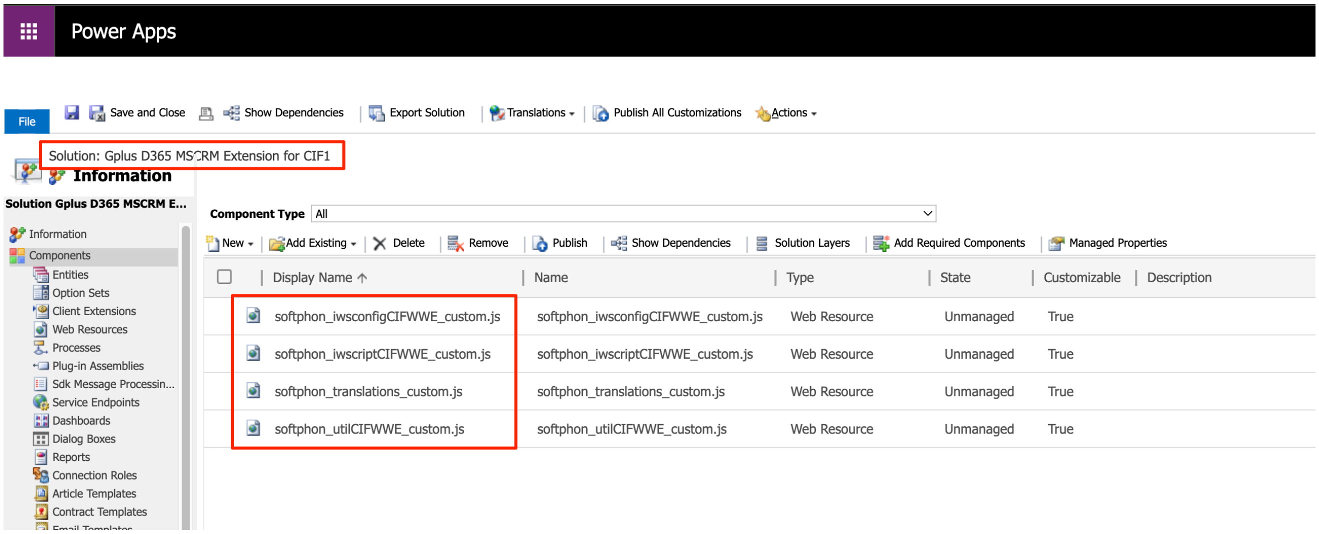
Will provide a unmanaged solution package **GPLUSD365_extension_package_XXX.zip**, specific for each solution CIF1, CF2 or USD, that contains all javascript file that the customer can modify to change the out of the box scenario or customized some participand data.



Configuring screen pops in Microsoft Dynamics 365 with CIF version 1.0

In Microsoft Dynamics 365 with CIF version 1.0, screen pop configuration is based on the following JavaScript files, which implement the out-of-the-box scenario for different fields:

1. **softphon_iwscriptCIFWWE.js_custom.js:** Computer Telephony Integration (CTI) events that the Adapter can capture
2. **softphon_utilCIFWWE_custom.js:** implementation of the events mentioned in the previous point
3. **softphon_iwsconfigCIFWWE.js_custom.js:** parameters necessary to customize the Adapter
4. **softphon_translations_custom.js:** switch to other languages



An extra file must be handled to customize the outbound-call scenario:

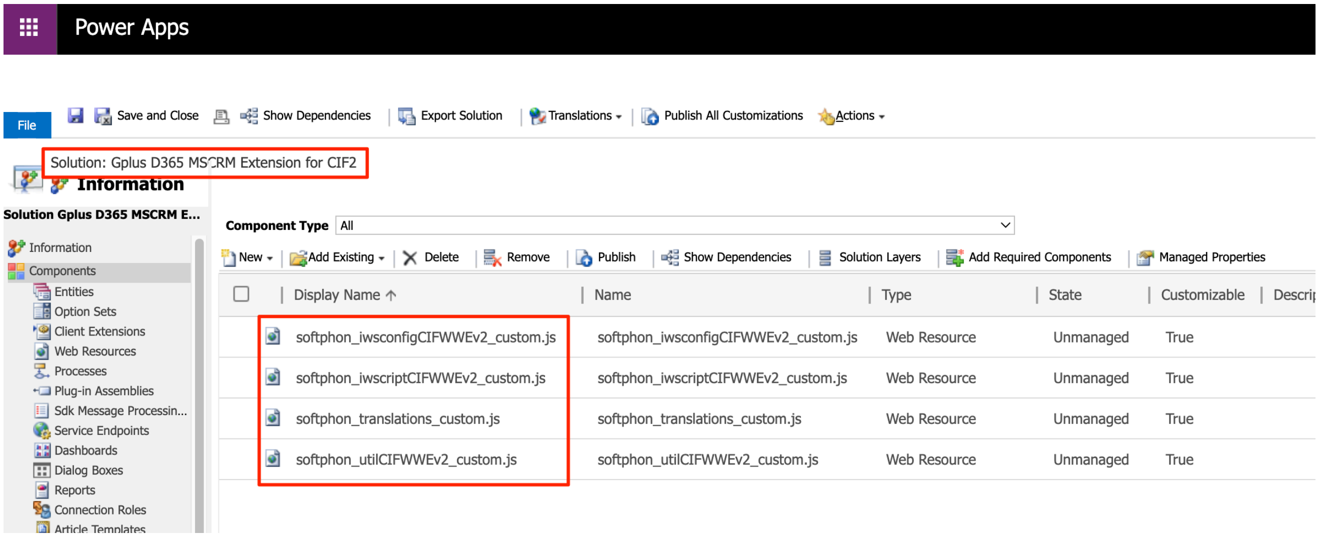
1. **softphon_CustomMakeCallCIFWWE.js:** wanted flow in case of outgoing interactions

For customization, follow the procedure presented in Screen pops customization.

Configuring screen pops in Microsoft Dynamics 365 with CIF version 2.0

In Microsoft Dynamics 365 with CIF version 2.0, screen pop configuration is based on the following JavaScript files, which implement the out-of-the-box scenario for different fields:

1. **softphon_iwscriptCIFWWEv2.js_custom.js:** Computer Telephony Integration (CTI) events that the Adapter can capture
2. **softphon_utilCIFWWEv2_custom.js:** implementation of the events mentioned in the previous point
3. **softphon_iwsconfigCIFWWEv2.js_custom.js:** parameters necessary to customize the Adapter
4. **softphon_translations_custom.js:** switch to other languages



An extra file must be handled to customize the outbound-call scenario:

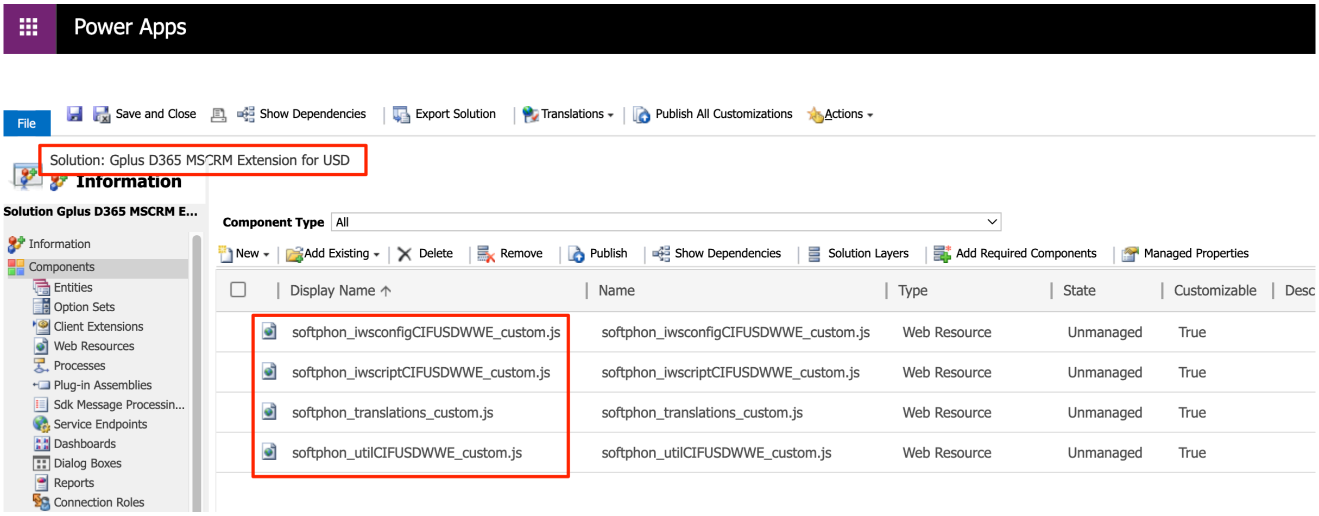
1. **softphon_CustomMakeCallCIFWWEv2.js:** wanted flow in case of outgoing interactions

To proceed with the customization, follow the procedure presented in Screen pops customization.

Configuring screen pops in Microsoft Unified Service Desk (USD)

In Microsoft USD, screen pop configuration is based on the following JavaScript files, which implement the out-of-the-box scenario for different fields:

1. **softphon_iwscriptCIFUSDWWE.js_custom.js:** Computer Telephony Integration (CTI) events that the Adapter can capture
2. **softphon_utilCIFUSDWWE_custom.js:** implementation of the events mentioned in the previous point
3. **softphon_iwsconfigCIFUSDWWE.js_custom.js:** parameters necessary to customize the Adapter
4. **softphon_translations_custom.js:** switch to other languages



An extra file must be handled to customize the outbound-call scenario:

1. **softphon_CustomMakeCallCIFUSDWWE.js:** wanted flow in case of outgoing interactions

For customization, follow the procedure presented in Screen pops customization.

Screen pops customization

Steps to generate new unmanaged solutions and create new screen-pop scenarios.

Unlike out-of-the-box use cases, which are deployed with the managed solution (as described in the Gplus installation in Microsoft Dynamics 365 or in Microsoft USD), to create new screen-pop scenarios, you must generate new **unmanaged solutions**. Follow this procedure.

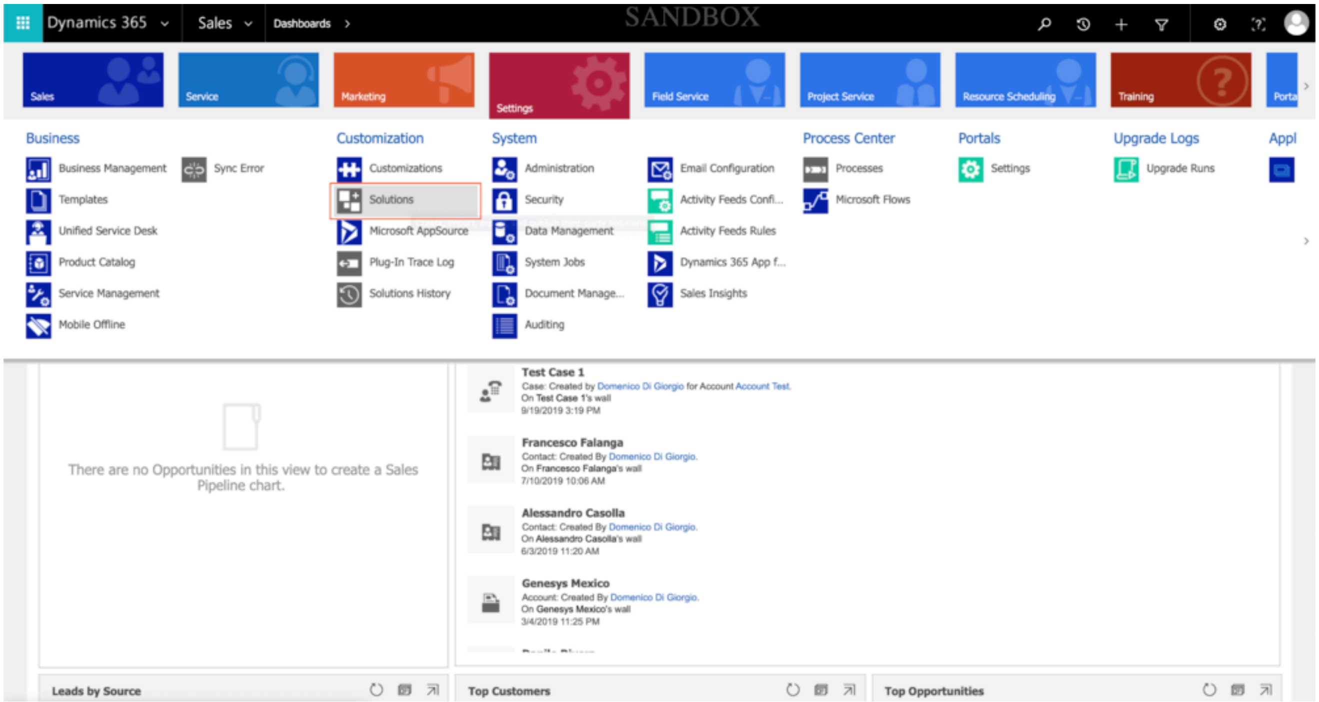
Important

The procedure for the customization of screen pops is the same for Microsoft Dynamics 365 (CIF versions 1.0 and 2.0) and Unified Service Desk (USD).

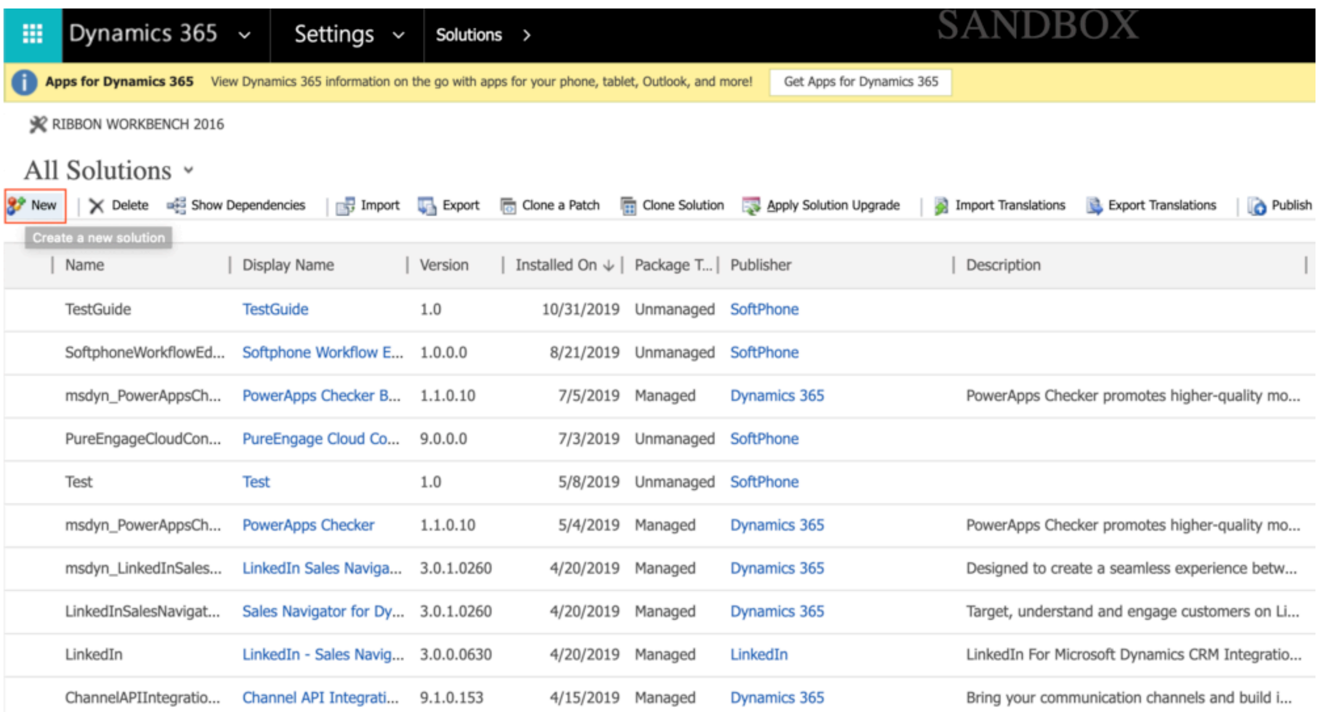
Extract the following JavaScript files from the Gplus Adapter's managed solution:

1. **iwscriptCIFWWE.js**
2. **utilCIFWWE.js**
3. **iwsconfigCIFWWE.js**
4. **translations_custom.js**
5. **CustomMakeCallCIFWWE.js**

Go in **Settings** and select **Solutions** from the Customization menu.

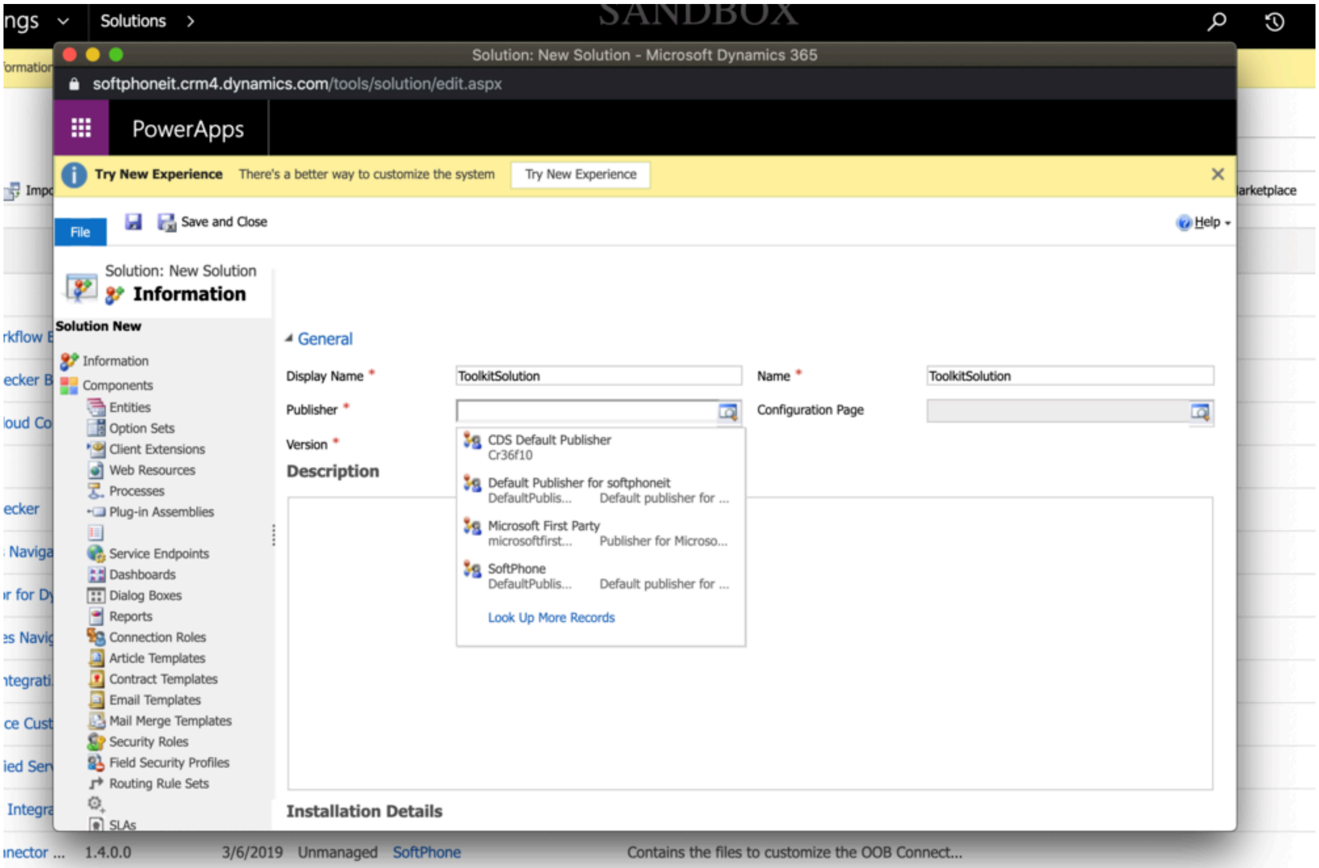


To create a new solution, click **New**.

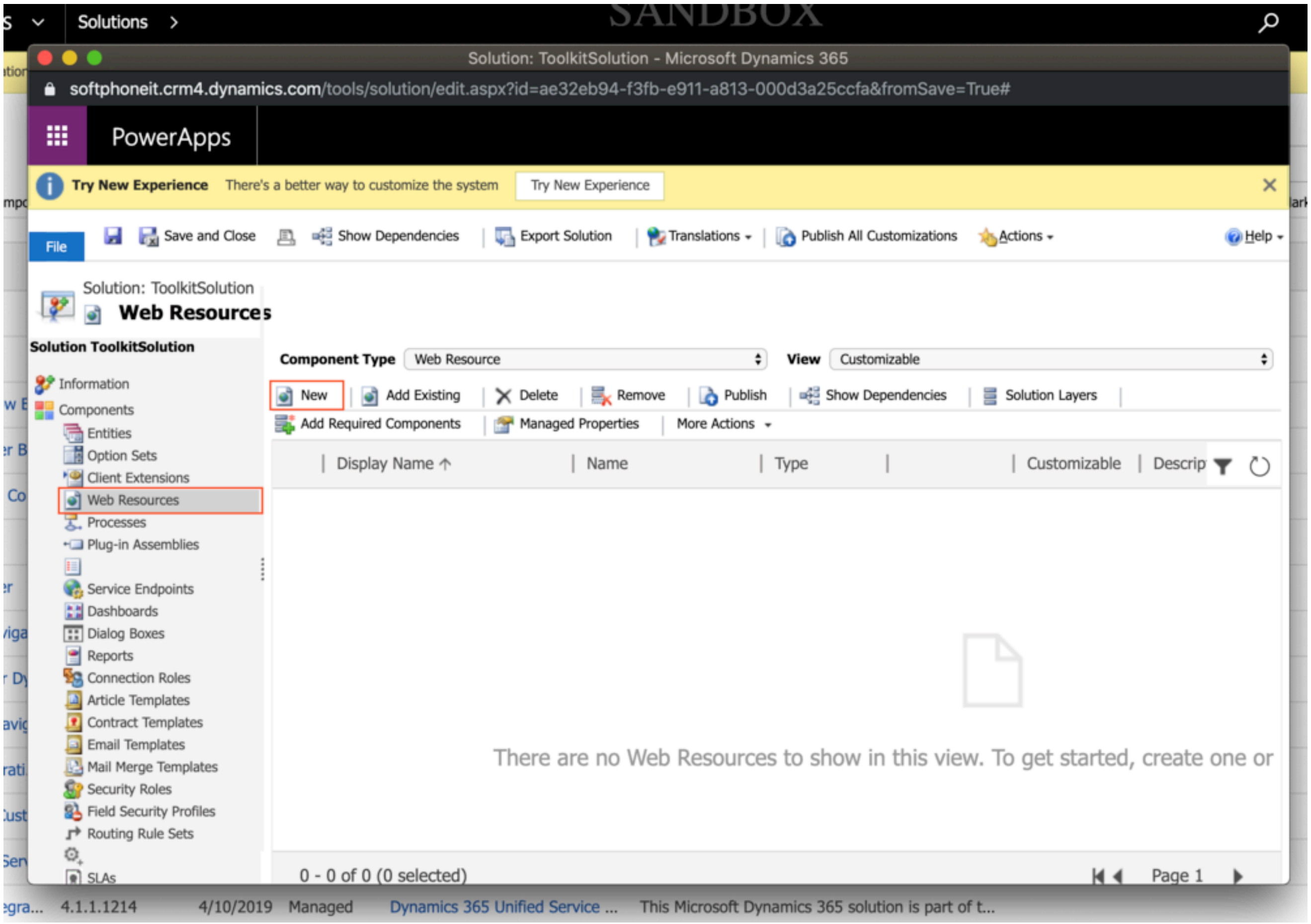


Fill out the required fields of the new solution:

- **Display Name:** your choice
- **Name:** you can employ the same name you provided in the Display Name field
- **Publisher:** search for the name of your organization or agent group
- **Version:** your choice

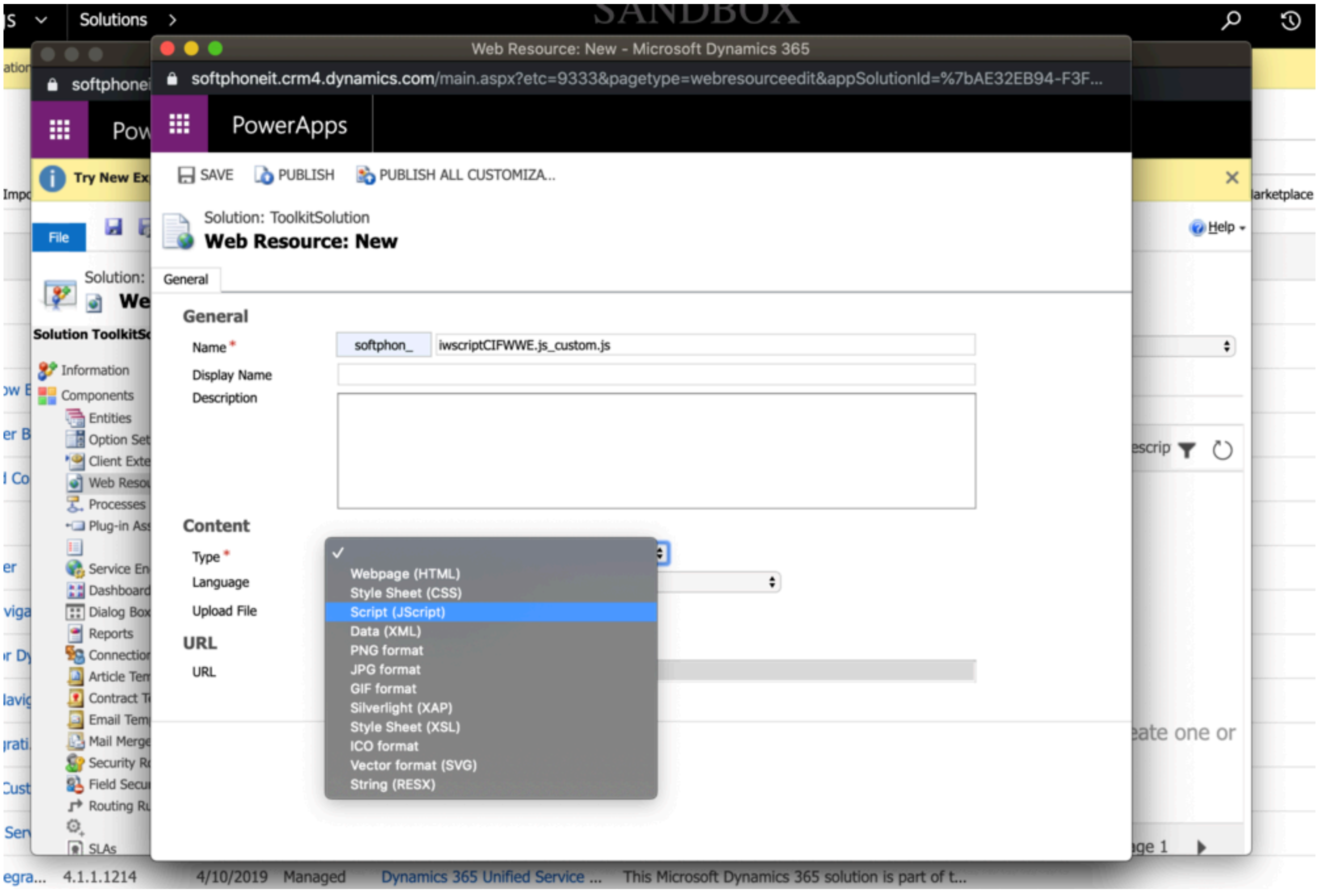


Click **Save**. Then go to **Web Resources** and click **New**.

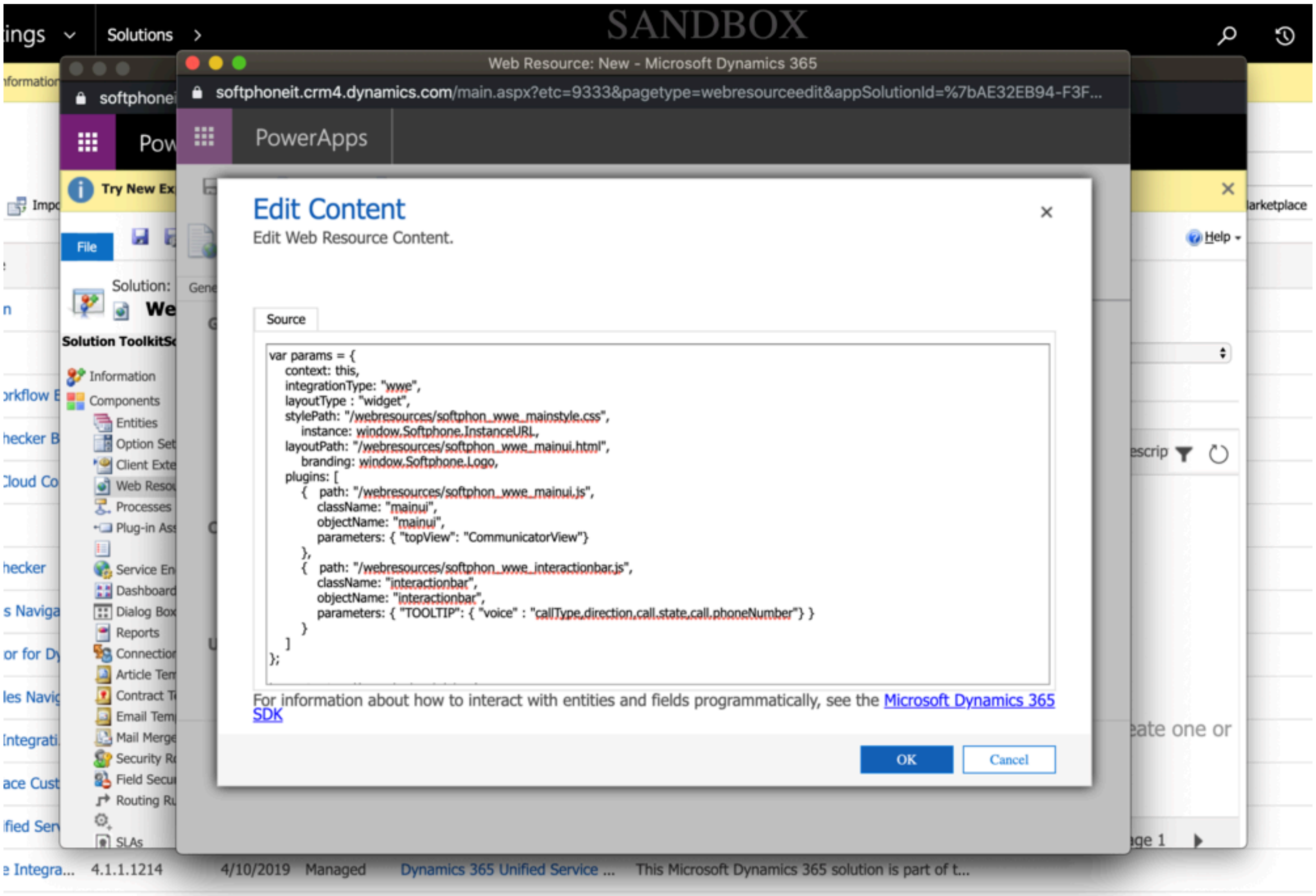


Fill out the required fields of the new web resource:

- **Name:** your choice among the five files provided for the customization
- **Type:** select **Script (JScript)** from the list menu



Click **Text Editor** and insert the related JavaScript code.



Click **Save** and **Publish** to finish the procedure. Repeat these steps for each of the five files.

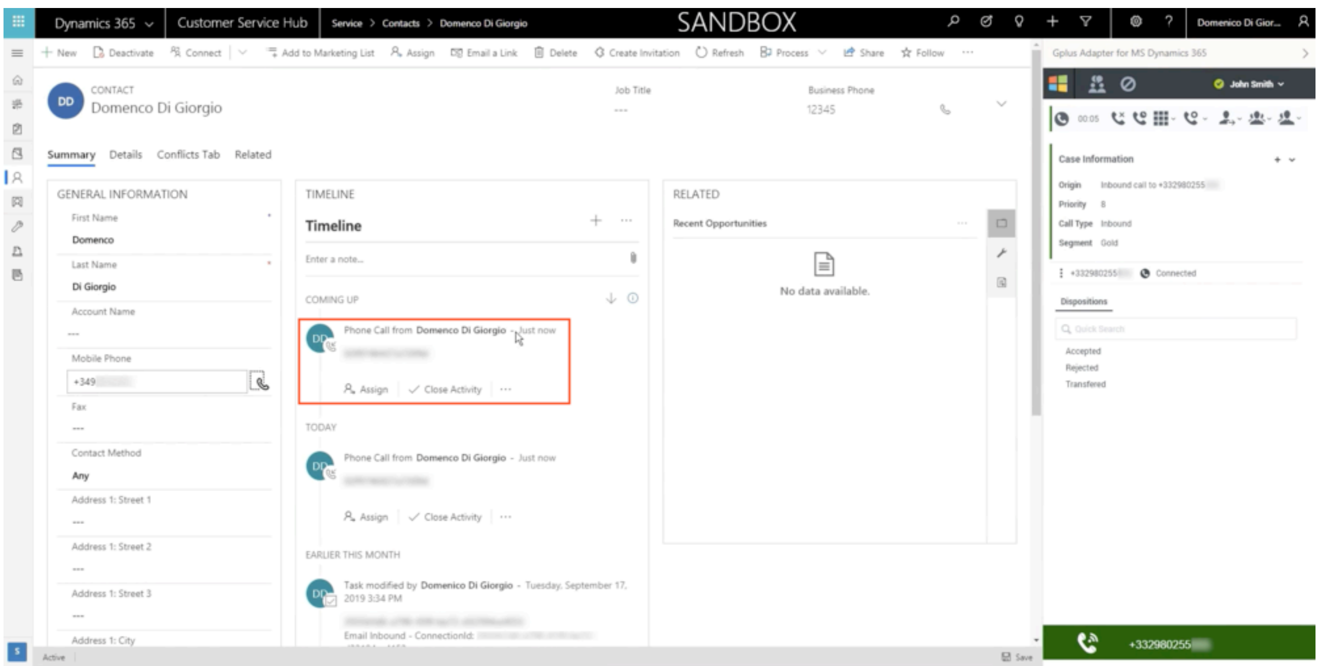
Activity History workings

Contents

The Gplus Adapter creates Activity History entries in Microsoft Dynamics 365 and Microsoft USD at the end of an inbound or outbound call.

Activity History creation in Microsoft Dynamics 365 or Microsoft USD

The Gplus Adapter creates activity logs in Microsoft Dynamics 365 or Unified Service Desk (USD) for every interaction handled by an agent. When the agent marks an interaction as **Done**, the Adapter searches for a corresponding contact in Dynamics, creates an **Activity History of type Call** for the interaction, and associates it with the Dynamics record.

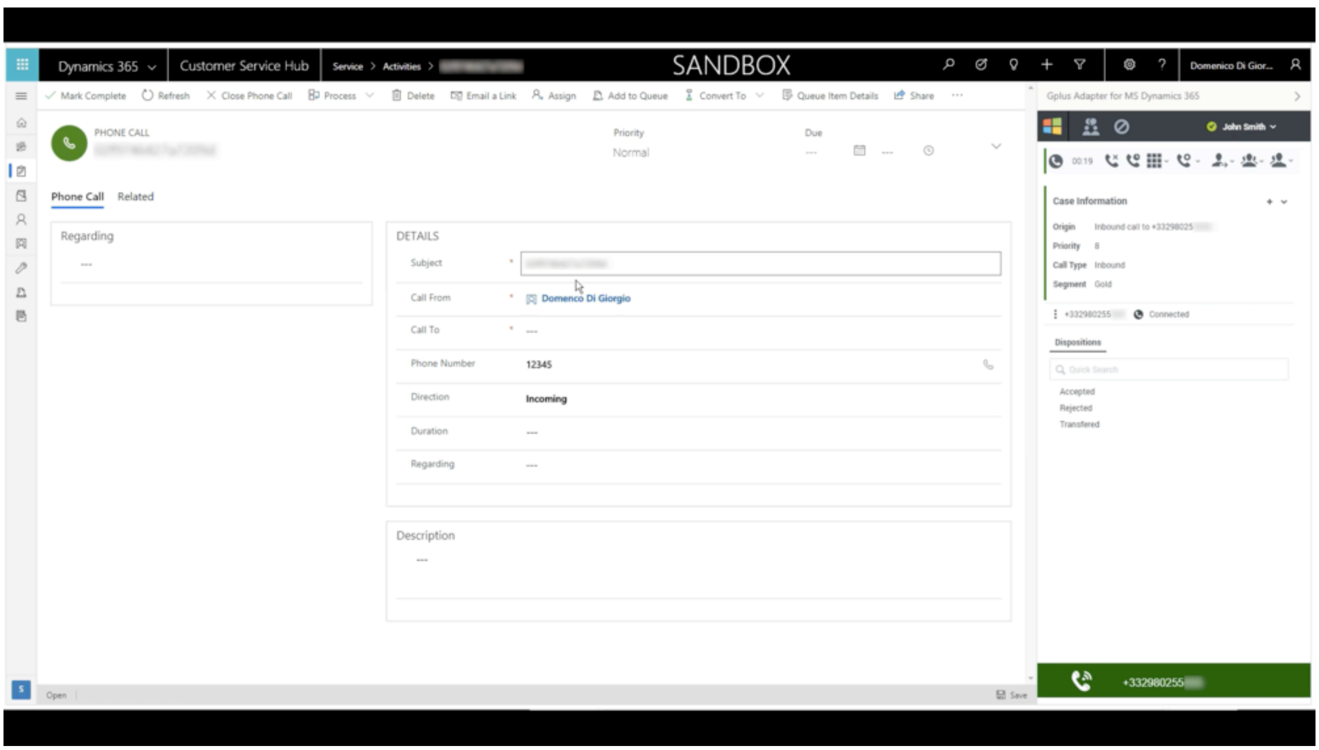


The rule the Adapter follows to select the correct record for the activity log creation is the same as for screen pop records. The **Automatic Number Identification (ANI)** is used as the search main criterion.

Activity History fields

The Adapter automatically updates specific Microsoft Dynamics 365 or USD activity fields when it saves an Activity History entry. The table below provides an extensive list of Microsoft Dynamics 365 fields included in each Activity.

Microsoft Dynamics 365 Activity Field	Description
Subject	Interaction ID
Call From	Inbound call: contact from which the call originated Outbound call: agent calling
Call To	Inbound call: agent accepting the call Outbound call: contact receiving the call
Phone Number	Telephone number from which the call originated
Direction	Type of call (inbound, outbound, or internal)
Duration	Length of the call in minutes and seconds (updated when the call ends)
Description	Comments and notes added by one or more involved agents



Saving interaction recording in Activity History

The Adapter can save the recorded voice file of both inbound and outbound calls.

The content of the **Genesys interaction** can be checked directly from the Activity History automatically created.

What is the Workflow Designer?

The Workflow Designer allows you to customize Workflows through a graphic interface.

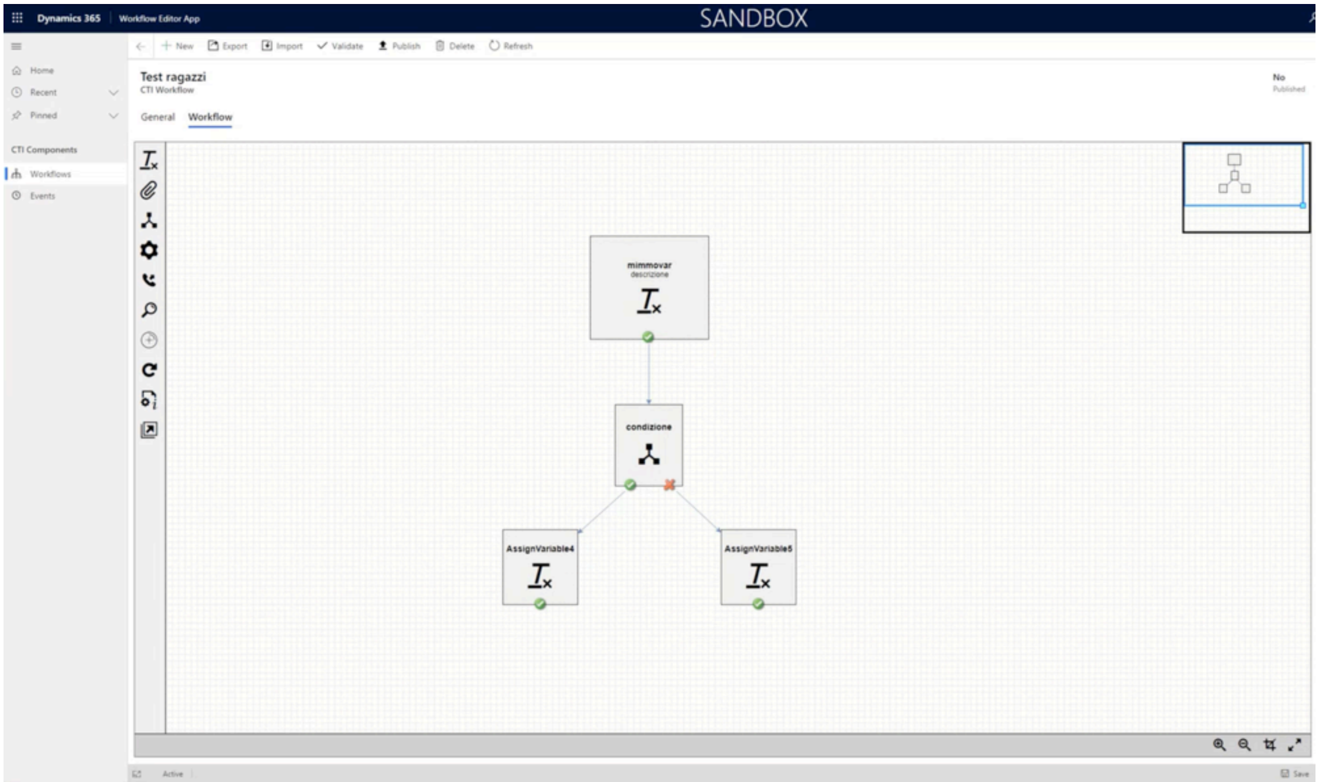
Important

This section and all information related to the **Workflow Designer** only apply to Microsoft Dynamics 365 with **Channel Integration Framework (CIF) version 1.0**.

The Workflow Designer is a solution created to **customize Workflows** within the Gplus Adapter for Microsoft Dynamics 365.

To customize Workflows in the current model, you must work on the scripts and modify the Workflow to match the final user's needs. Once you have created this script, you must save it in Dynamics within a specific JavaScript package and then publish it. After the publication, you can check if the Workflow works correctly. To do that, you must have at your disposal both a **Genesys Multicloud CX environment** and the **Adapter**, perform the related actions and see what happens when the Workflow is supposed to take place.

The Workflow Designer makes this process easy and quick thanks to its graphical interface.



Moreover, users do not need to be developers to create Workflows and test them. For further information on Workflow testing, check The Workflow Debugger.

> ## Important
> The **current model** of Workflow creation does not exclude the **Workflow Designer** and vice versa: these two procedures can operate simultaneously **without conflicting**, offering customers increased flexibility. It means that some Workflows can be developed working on JavaScript with the current model, while others can be created with the Workflow Designer.

See How to use the Workflow Designer to learn about its functioning.

How to install the Workflow Designer

Procedure to install the Workflow Designer for the Gplus Adapter for Microsoft Dynamics 365.

We assume that Microsoft Dynamics 365 has been configured with Channel Integration Framework (CIF) version 1.0 and that you own a Microsoft Dynamics 365 login with administrator privileges. Moreover, the Gplus Adapter must be installed and configured with CIF V1.0 as well.

Important

This section and all information related to the **Workflow Designer** only apply to Microsoft Dynamics 365 with **Channel Integration Framework (CIF) version 1.0**.

This procedure explains how to deploy the Gplus Adapter Web Resources in Microsoft Dynamics 365. The package includes the following solution to be imported:

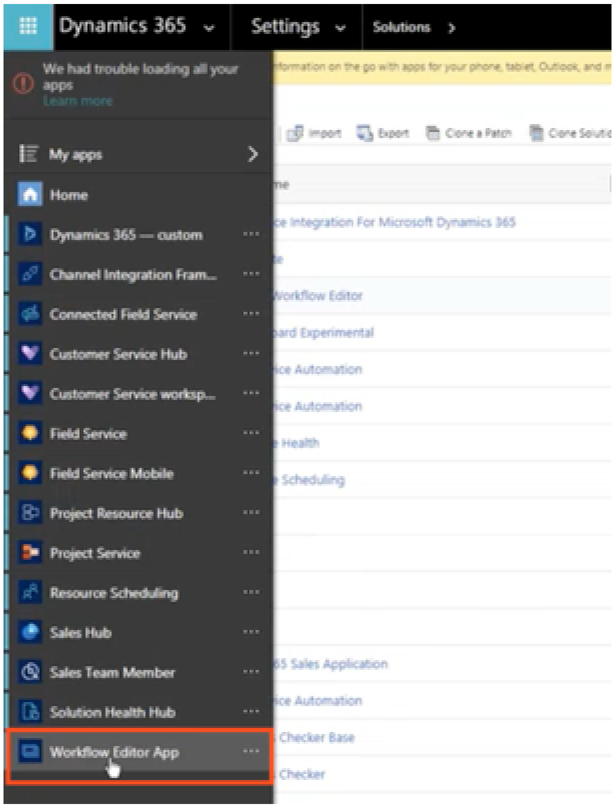
- **SoftphoneWorkflowEditor.zip**

This managed solution implements the Workflow Designer.

Installation steps:

1. Log in to Microsoft Dynamics 365 with administrator rights and navigate to **Settings**.
2. From Settings, go into **Solutions** and click the **Import** button.
3. Select the Web Resources Zip File (**SoftphoneWorkflowEditor.zip**) to import it into the Microsoft Dynamics 365 environment.

Once the Workflow Designer is installed, the Adapter automatically deploys the related Power Application under its instance. This application, called the **Workflow Editor App**, is now visible among all other Power Apps in the Dynamics navigation on the left side.



Proceed to How to configure the Workflow Designer to learn how to set it up.

How to configure the Workflow Designer

Contents

Steps to configure the Workflow Designer.

Creating a new unmanaged solution

> **Important**
>
> This section and all information related to the **Workflow Designer** only apply to Microsoft Dynamics 365 with **Channel Integration Framework (CIF) version 1.0**.

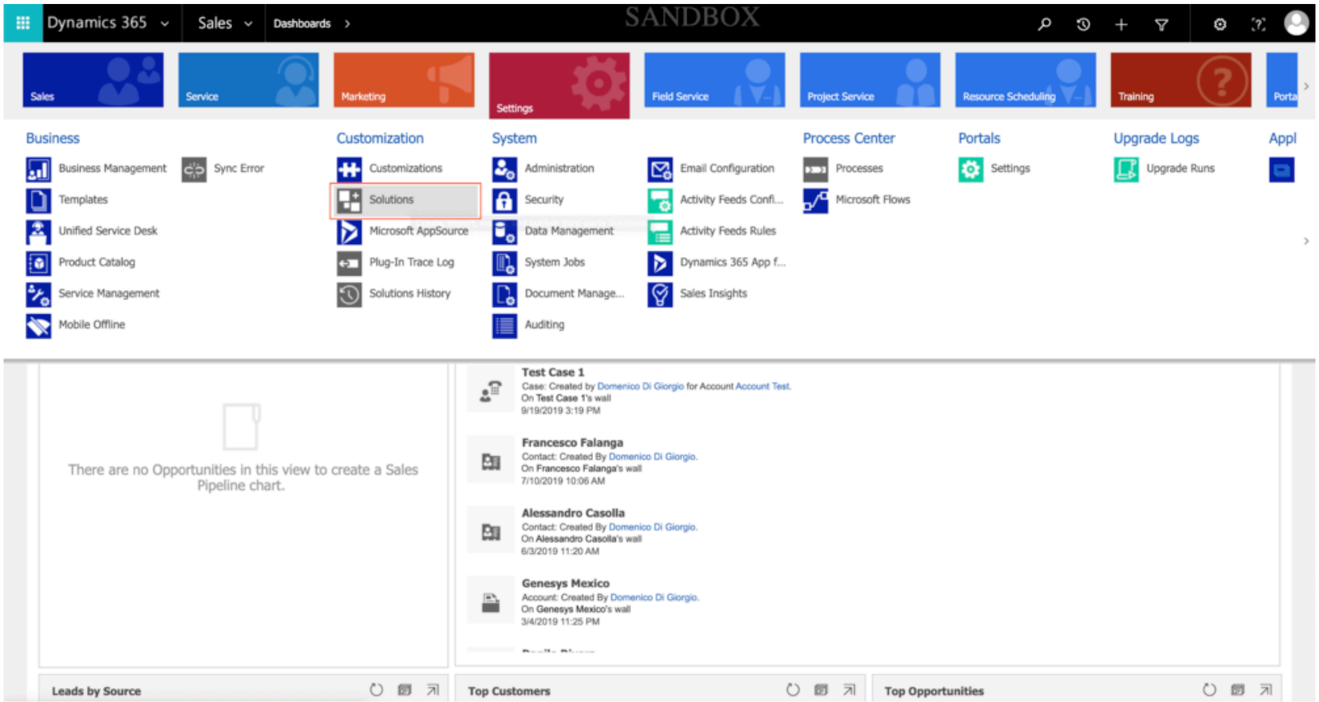
Unlike the Workflow Designer installation, which is deployed with the managed solution, to enable the Gplus Adapter for Microsoft Dynamics 365 to work with the Workflow Designer, you have to create a new **unmanaged solution** based on the following JavaScript file:

- **_workflows.js**

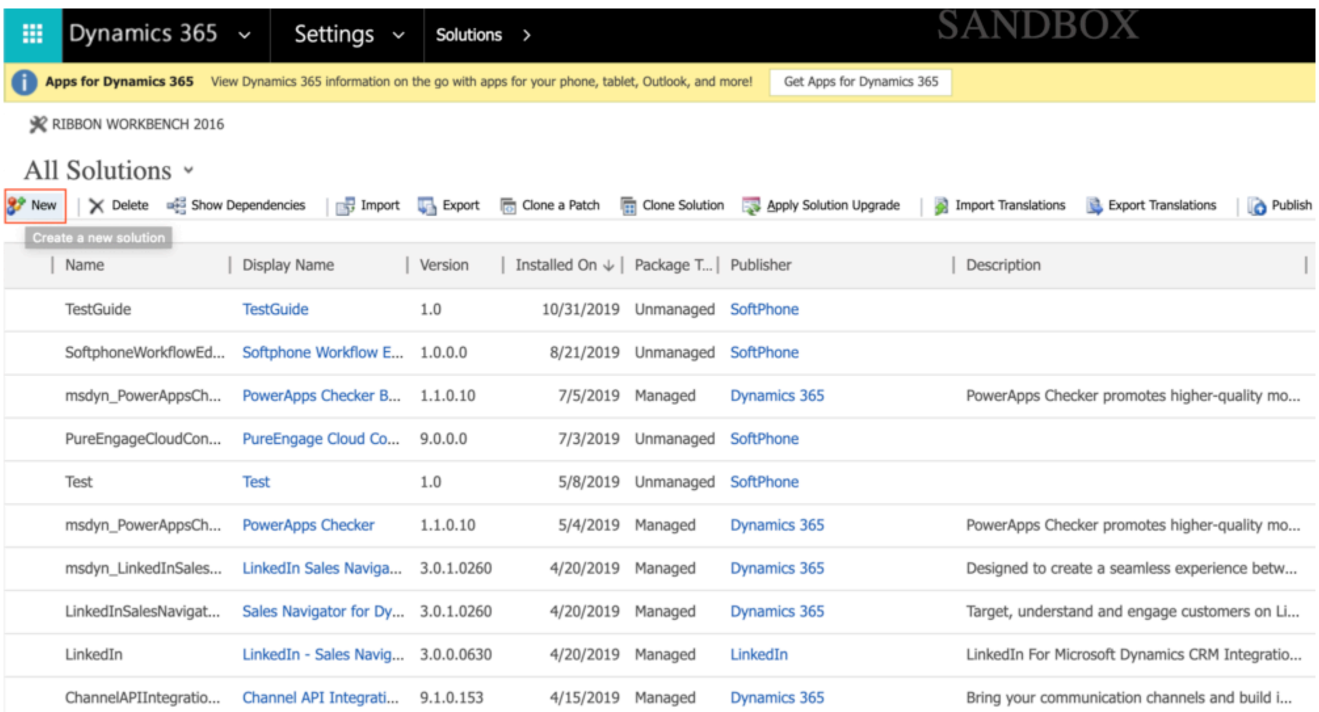
> **Important**
>
> is an example of how the file is named. Once you generate the unmanaged solution, your organization name will take the place of .

Follow this procedure.

Go in **Settings** and select **Solutions** from the Customization menu.



Click **New** to create a new solution.

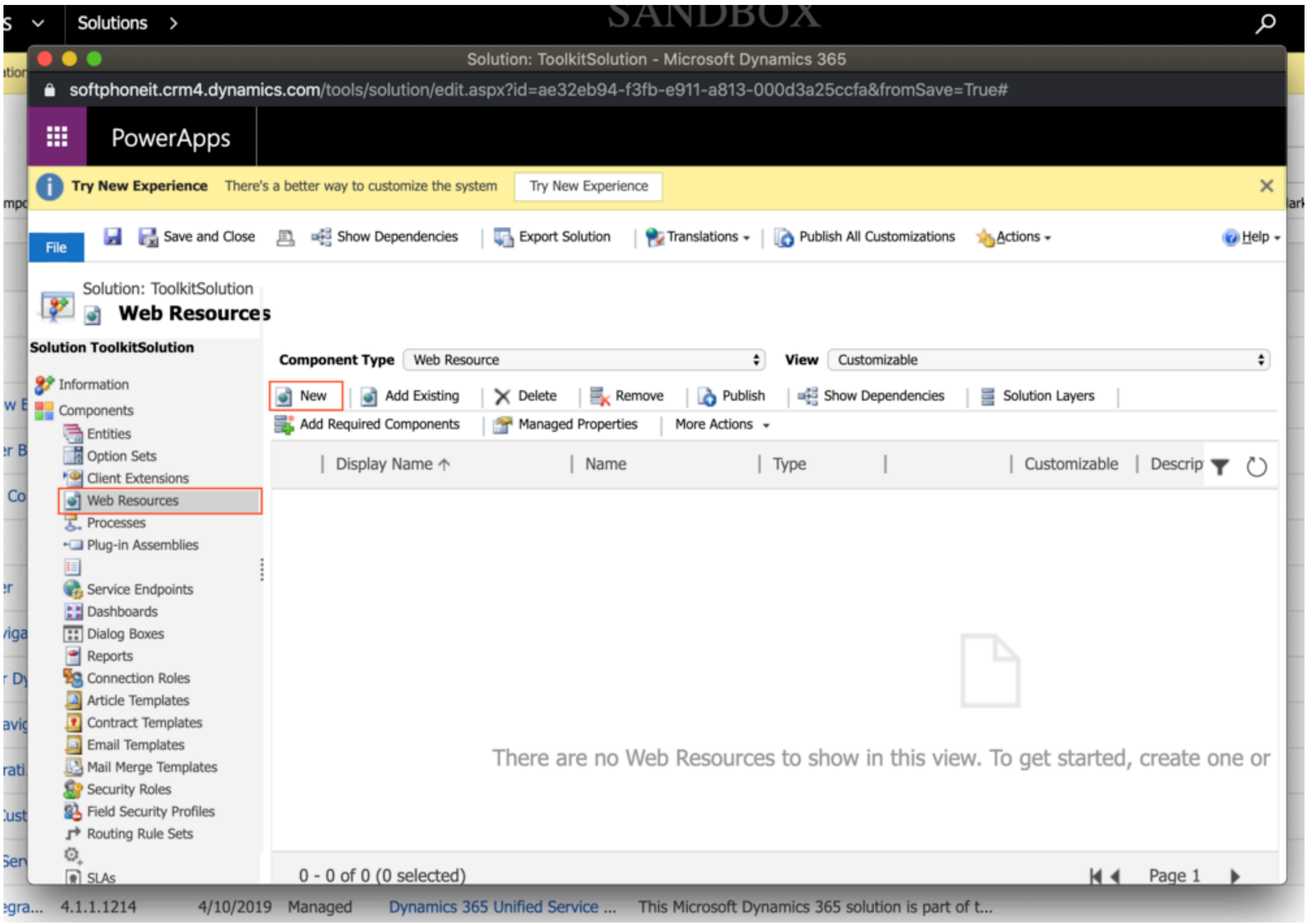


Fill out the required fields of the new solution:

- **Display Name:** your choice
- **Name:** you can employ the same name provided in the Display Name field
- **Publisher:** search for the name of your organization or agent group
- **Version:** your choice

Click **Save**.

Go to **Web Resources** and click **New**.



Fill out the required fields of the new web resource:

- **Name:** _workflows.js
- **Type:** select **Script (JScript)** from the drop-down menu

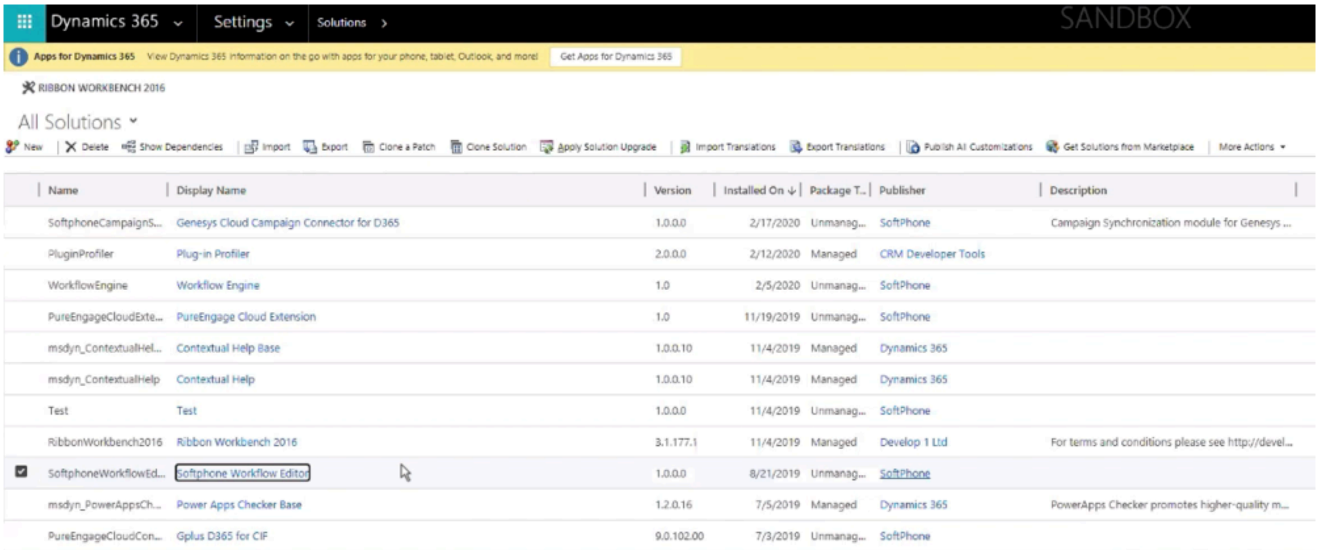
Click **Text Editor** and just type a space.

Click **Save** and then **Publish** to finalize the procedure.

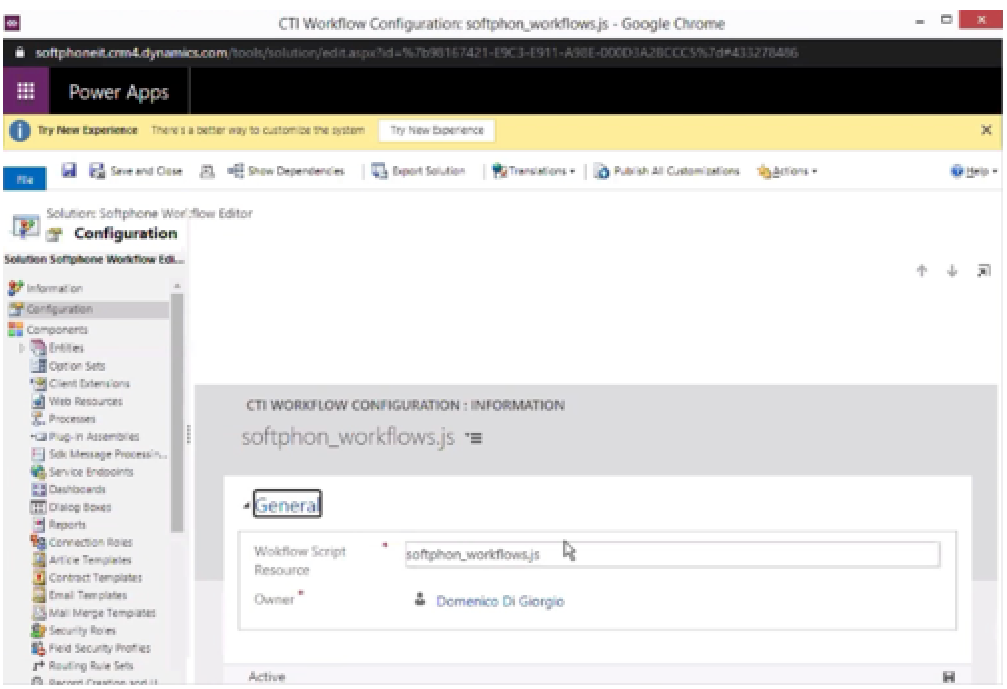
Configuring the Workflow Editor App

To finalize the configuration, follow these steps:

Go back to **Solutions** and click the imported **Softphone Workflow Editor**: a new configuration window appears.



Insert your customized **_workflows.js** as the Workflow Script Resource.



Open the CIF application by clicking the Microsoft Dynamics 365 **list menu** and selecting **Channel**

Integration Framework.

Select **WWE** and make sure that its parameters are set as follows:

- **Name:** WWE
- **Label:** Gplus Adapter for MS Dynamics 365
- **Channel URL:** "https:///webresources/softphon_index_wwe.html"
- **Enable Outbound Communication:** Yes
- **Channel Order:** 5
- **API Version:** 1.0
- **Trusted Domain:**
- **Custom Parameters:** {"CustomFlow": false, "CustomPrefix": "softphon", "MakeCall": true, "InstanceURL": https://, "logo": "/webresources/softphon_microsoft.png", "Width": 450, "Language": "en-US", "UseWorkflowEngine": true, "CustomWorkflowMakeCall": true}

Important

When filling out the **Channel URL** field, you have to replace with your own Microsoft Dynamics 365 Domain.

Important

When filling out the **Custom Parameters** field, you have to replace with your own Genesys URL.

Important

When filling out the **Custom Parameters** field, you have to add "UseWorkflowEngine" and set it to "true" for the Workflow Designer to effectively run designed workflows in the case of any associated Events. In the case of unassociated Events, the Adapter will perform as usual.

Important

When filling out the **Custom Parameters** field, you have to add "CustomWorkflowMakeCall" and set it to "true" to activate the **onBeforeOutboundCallStart** event. In the case this parameter is missing or set to false, the Event will not be generated.

Continue to How to use the Workflow Designer to learn about its functioning.

How to use the Workflow Designer

Contents

Workflow Designer features and workings.

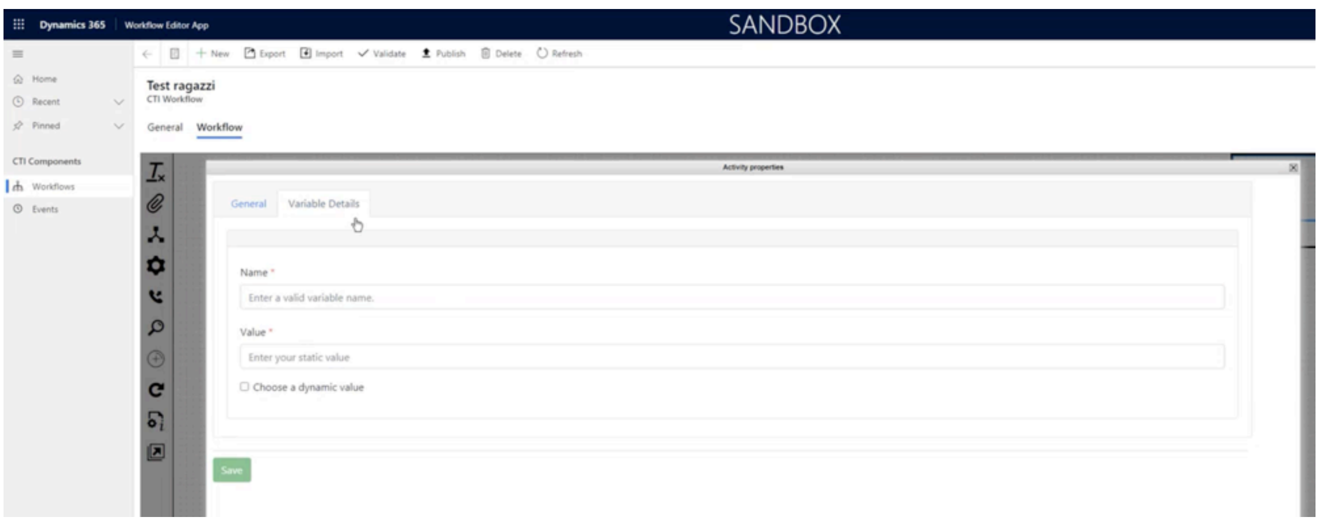
Important

This section and all information related to the **Workflow Designer** only apply to Microsoft Dynamics 365 with **Channel Integration Framework (CIF) version 1.0**.

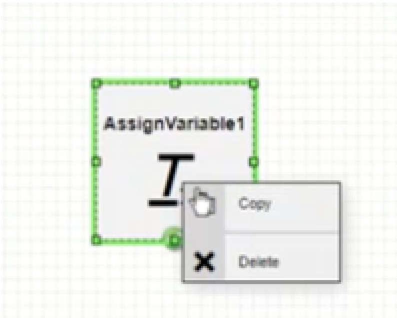
The Workflow Designer is a visualization of Workflows' components: each element is graphically rendered as a square tile, while links are in the form of arrows. Some tiles show several ports (for example true/false, 0/1/N), which can be linked to further tiles.

To start designing your Workflow, drag and drop any Activity you see in the left-side menu in the form of icons on the editor area.

When clicking a tile, it opens in a new dialog box with different tabs according to the Activity it represents. However, all tiles display the same General tab at first, where you can fill the same two fields: **Activity name** and **Description**. These names and descriptions should be helpful across your team to immediately recognize every Activity.



Right-clicking an Activity, you can duplicate it selecting **Copy** or delete it choosing **Delete**. Continue reading for in-depth information about Activities.



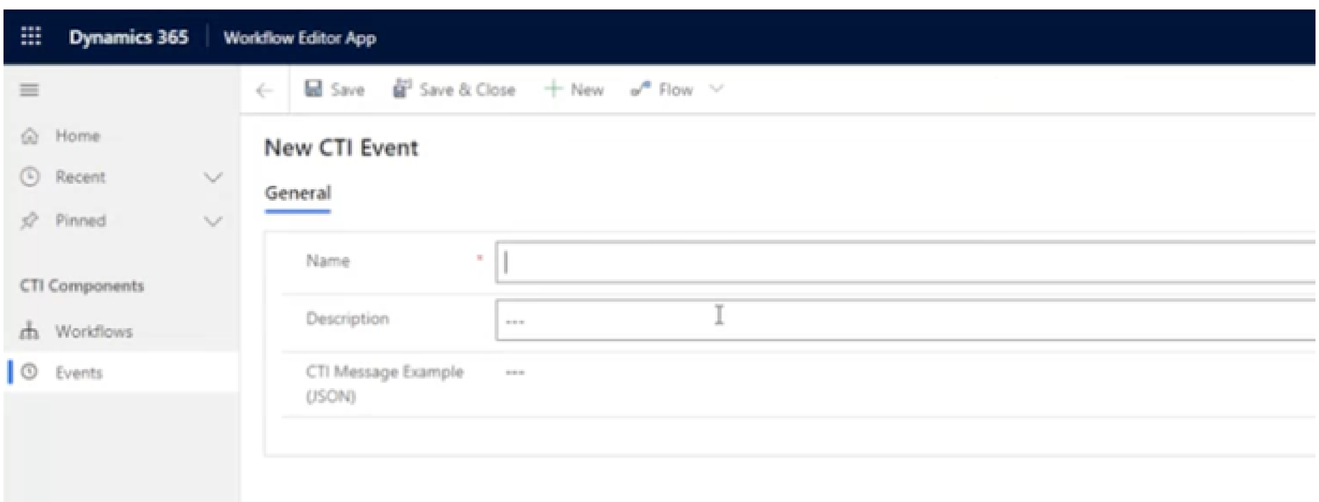
Creating Workflows and Events

Before starting to use the Workflow Designer, you must get familiar with its two key elements:

- **Workflows**, where you drag and drop activities and draw their customization;
- **Events**, which exactly match events described through JavaScript and exchanged between CTI and Microsoft Dynamics 365.

If you want to design a Workflow, first you must create the related Event.

To create a new Event, click **+ New** and the related form will open. Provide a Name, a Description (optional), and a CTI Message Example, then click **Save**.



You can provide one of the following **Events triggered by the Adapter**:

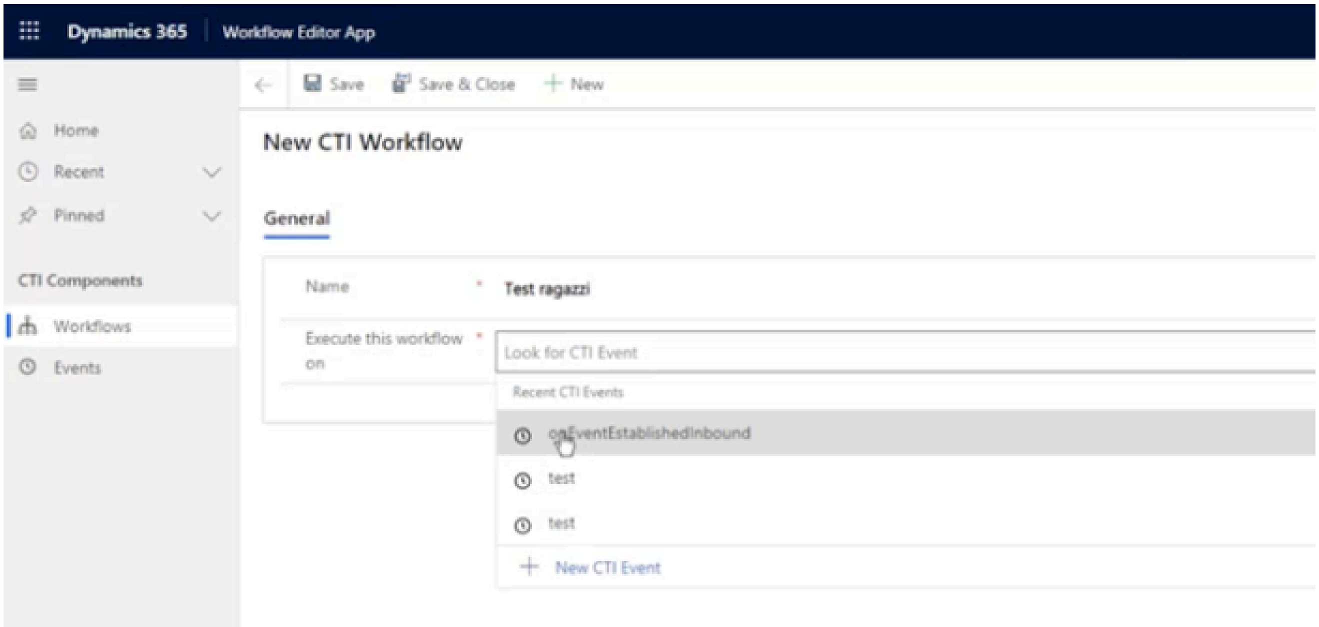
Event	Description
onEventRingingInbound	An inbound call enters (before the Agent accepts the interaction).
onEventEstablishedInbound	The Agent accepts an inbound call and the

Event	Description
	connection with the caller is established.
onEventReleasedInbound	The Agent ends an inbound call but can still add notes or modify details.
onEventMarkDoneInbound	The Agent totally completes an inbound call and the interaction is deleted from the widget.
onEventDialingOutbound	The Agent launches an outbound call (before the connection with the Contact is established).
onEventEstablishedOutbound	The Contact accepts an outbound call performed by the Agent and the connection is established.
onEventReleasedOutbound	The Agent (or the Contact) ends an outbound call but can still add notes or modify details.
onEventMarkDoneOutbound	The Agent totally completes an outbound call and the interaction is deleted from the widget.
onBeforeOutboundCallStart	Event triggered before an outbound call starts, which means before the onEventDialingOutbound event. Can be leveraged to dial numbers in a different format than the one saved on the CRM or attach custom CRM data before the outgoing call is effectively started.

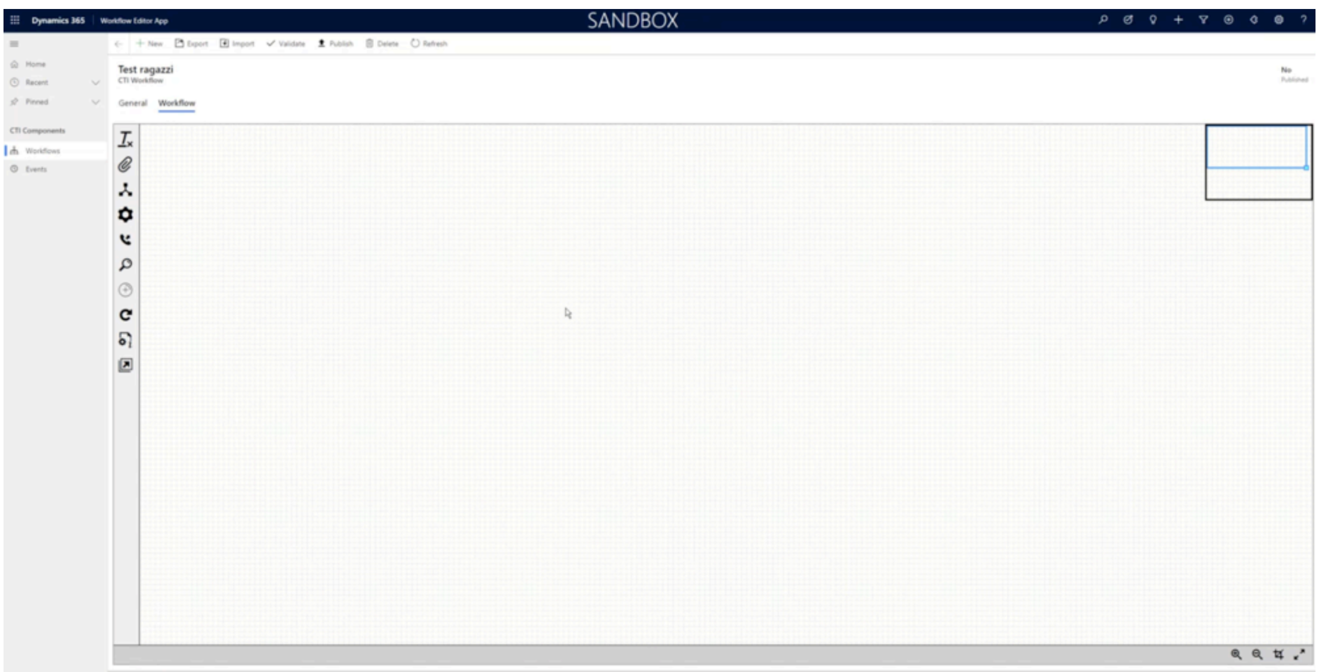
Important

To activate the **onBeforeOutboundCallStart** event, you have to add "CustomWorkflowMakeCall" and set it to "true" when filling out the Workflow Designer's Custom Parameters field. In the case this parameter is missing or set to false, the onBeforeOutboundCallStart event will not be generated.

Once you have created the Event, you can proceed with an associated Workflow. To begin, click **+ New**, provide a Name and choose the associated Event.



When you click **Save**, the Editor appears and displays the Workflow Editor area, where you can drag and drop the Activities. You can now start and design your Workflow.



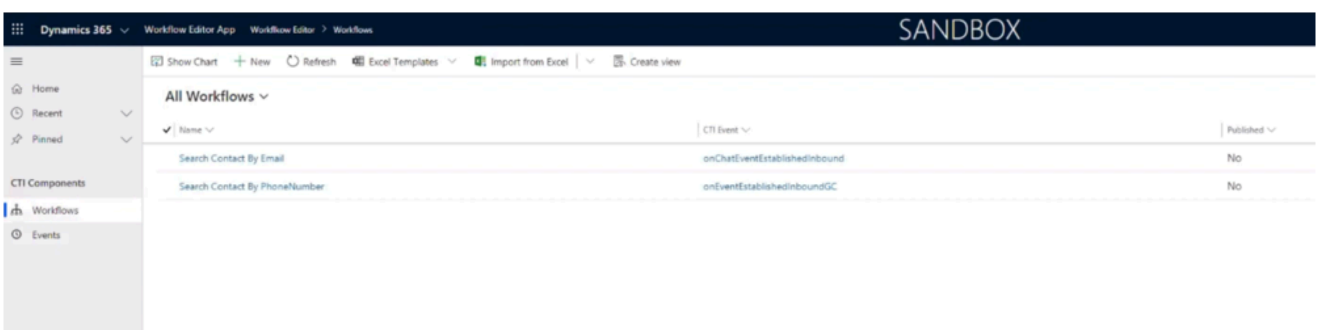
After designing a Workflow, you can test its functioning with The Workflow Debugger.

The ribbon menu

When you open the actual Workflow Designer, a horizontal menu appears on top of the window: it is the ribbon menu, which displays all actions that can be performed with the Workflow you are designing.

Name	Description
Export	Exports a designed Workflow as an XML file.
Import	Imports Workflows previously saved as XML files. The Workflow will directly appear in the Workflow Designer.
Validate	Checks that the Workflow is logically accurate and ready to be published. The outcome is displayed in a dialog box.
Publish	Publishes the Workflow in the production stage: if the related Event happens, the Workflow is effectively run.
Delete	Deletes the Workflow. It is only displayed while the Workflow is still unpublished.
Unpublish	Unpublishes the Workflow from the production stage. It is only displayed after its publication.
Refresh	Refreshes the Workflow Designer.

To verify your Workflow's publication status, go into **Workflows** and make sure to be on the **All Workflows** view. In the table, you will see the name, associated Event, and publication status for each Workflow.



> ### Important
> When you save a Workflow, there is no automatic check on its name. Be careful: you can create several Workflows with the **same name** associated with the **same Event**.

The Activity menu

The Workflow Designer Activities can be divided into generic and CRM-specific:

Icon	Name	Type of Activity	Description
	Create a Workflow variable	Generic	Creates a variable.
	Attach information to the current interaction	Generic	Performs an attached-data operation.
	Evaluate a Boolean condition	Generic	Inserts a branch (IfThenElse).
	Run a generic JavaScript code	Generic	Allows to insert your JavaScript code and choose the wanted number of ports.
	Start an outbound call	CRM-specific	Allows starting an outbound call (equals MakeCall).
	Search for a CRM record	CRM-specific	Performs a search within Microsoft Dynamics 365.
	Create a CRM record	CRM-specific	Creates a record of whichever wanted Entity within Dynamics.
	Update a CRM record	CRM-specific	Updates a record of whichever existing Entity within Dynamics.
	Get information from a specific CRM record using its identifier	CRM-specific	Obtains all wanted information about an exiting record within Dynamics.
	Display a CRM record	CRM-specific	Runs the screen-pop of a Dynamics form.

Create a Workflow variable. Creates a variable. You can define a variable precisely as if you were coding and choose to assign it a:

- **static value:** fixed value in the data field, which will appear on every record that references the rule;
- **dynamic value:** data value that varies depending on the current record running the Workflow rule.

See all available dynamics value types in the table at the bottom of this page.

> **Important**
>
> **Variables** are crucial because, once they have been defined, they are available within the Workflow for any Activity to use them.

Attach information to the current interaction. Performs an attached-data operation, enriching the current interaction record with additional information. This can be used for Genesys reporting and when the interaction is transferred to another agent.

Evaluate a Boolean condition. Inserts a branch (IfThenElse). The value you assign to this variable can return a true value (condition verified, green port) or a false one (condition not verified, red port). Therefore, it divides the Workflow into two branches. You need three elements for every condition: left operand, JS operator, right operand. Multiple conditions are allowed (and/or).

Run a generic code. Allows you to insert your JavaScript code and choose the wanted number of ports. This Activity is essential for all those cases too complicated to be satisfied by standard Activities. Since it is based on JavaScript code, it is more likely to be used by developers.

Start an outbound call. Allows starting an outbound call (equals MakeCall). It enables an outgoing call on the API made available by the Gplus Adapter. The involved telephone number can be static or dynamic. It can be used to run a custom flow or attach data before the call is performed.

Search for a CRM record. Performs a search within Microsoft Dynamics 365. This Activity creates output Workflow parameters and can have different ports: 0 (no match), 1 (single match), N (multiple matches). Therefore, Workflow parameters not only depend on the Activity but also on the exit port. Multiple conditions are allowed (and/or). You can even manually insert your search filter in the form of a JavaScript code. For further information, check the page that Microsoft dedicated to the topic.

Create a CRM record. Creates a record of whichever wanted Entity within Dynamics (for example Phone Call, Task, Email). This Activity creates output Workflow parameters and allows chaining.

Update a CRM record. Updates a record of whichever existing Entity within Dynamics (for example after releasing a call, it can update its duration). It requires the Entity unique identifier to perform the update.

Get information from a specific CRM record using its identifier. Obtains all wanted information about an existing record within Dynamics. If the record's unique identifier is available, you can get all the wanted information about it.

Display a CRM record. Runs the screen-pop of the wanted Dynamics form.

Here you can find a list of dynamic value types available in the Workflow Designer:

Type	Description
CTI Attachdata	Value of a Property in a specific JSON section.
CTI Property	Value of any Property within the JSON.
Workflow parameter	Output value of a Workflow.
Workflow variable	Value of another variable defined within a Workflow.
Global parameter	Values always available within a CRM (for example current user ID, language)
Custom JavaScript code	All other values (to be described through JavaScript code).

After designing a Workflow, you can test its functioning with The Workflow Debugger.

The Workflow Debugger

Contents

The Workflow Debugger allows you to test Workflows simulating the Gplus Adapter's functioning.

Important

This section and all information related to the **Workflow Designer** only apply to Microsoft Dynamics 365 with **Channel Integration Framework (CIF) version 1.0**.

Unlike the current model, which necessarily needs the whole Gplus Adapter and the Genesys Multicloud CX environment, you can test the Workflows you designed with a useful tool coming along with the Workflow Designer: the **Workflow Debugger**, a sort of Adapter simulator.

The Adapter triggers Events inside Microsoft Dynamics 365 with a specific message. The Workflow Debugger simulates the trigger of this message exactly like the Adapter would do.

Displaying the Workflow Debugger

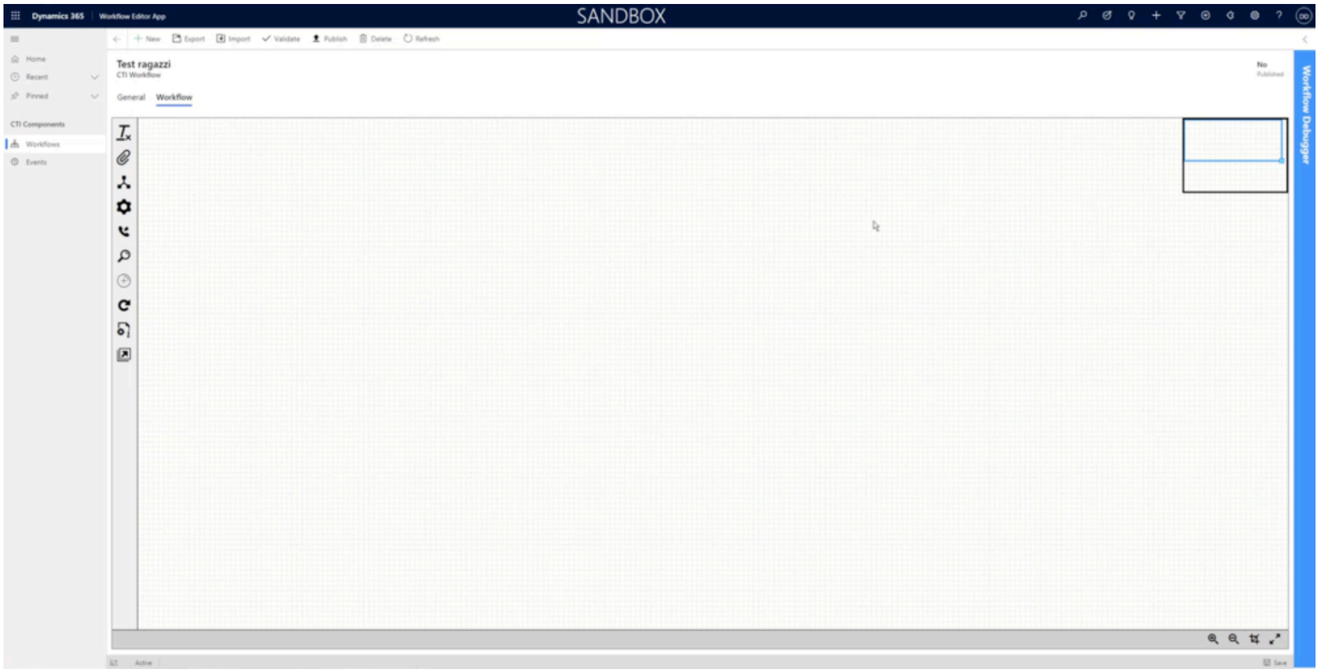
The Workflow Debugger is not displayed just after the Designer installation. To activate it, follow this procedure.

1. Open the CIF application by clicking the Microsoft Dynamics 365 **list menu** and selecting **Channel Integration Framework**.
2. Create a new channel provider by clicking **+ New**.
3. Provide the following parameters:
    - **Name:** any name
    - **Label:** Workflow Debugger
    - **Channel URL:** "https:///webresources/softphon_WorkflowDebugger.html"
    - **Enable Outbound Communication:** No
    - **Channel Order:** 1
    - **API Version:** 1.0
    - **Trusted Domain:**
    - **Custom Parameters:**
4. Insert **Workflow Editor App** in the central selection (select Unified Interface Apps for the Channel).
5. Click **Save**.

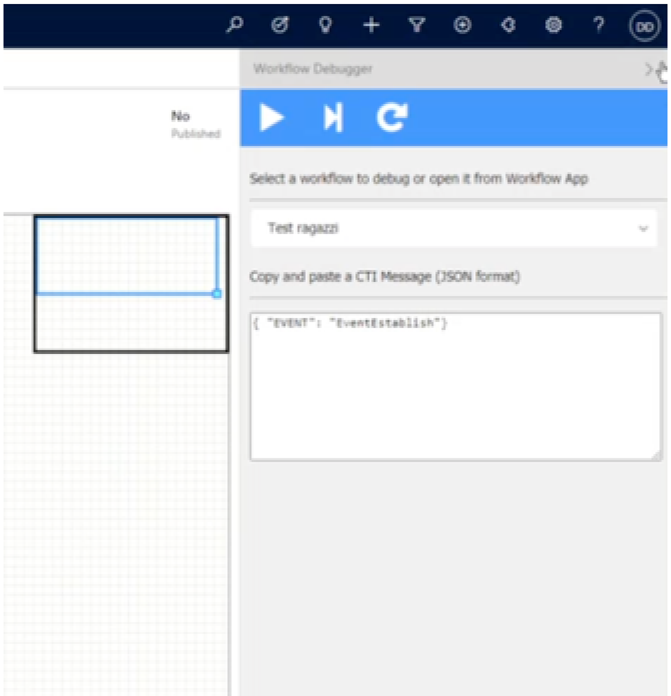
Important

After filling out the **Channel URL** field, you have to replace with your own Microsoft Dynamics 365 domain.

After this procedure, the Workflow Debugger will be displayed on the right side.

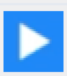
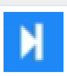
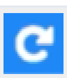


Click it and it will open.



Using the Workflow Debugger

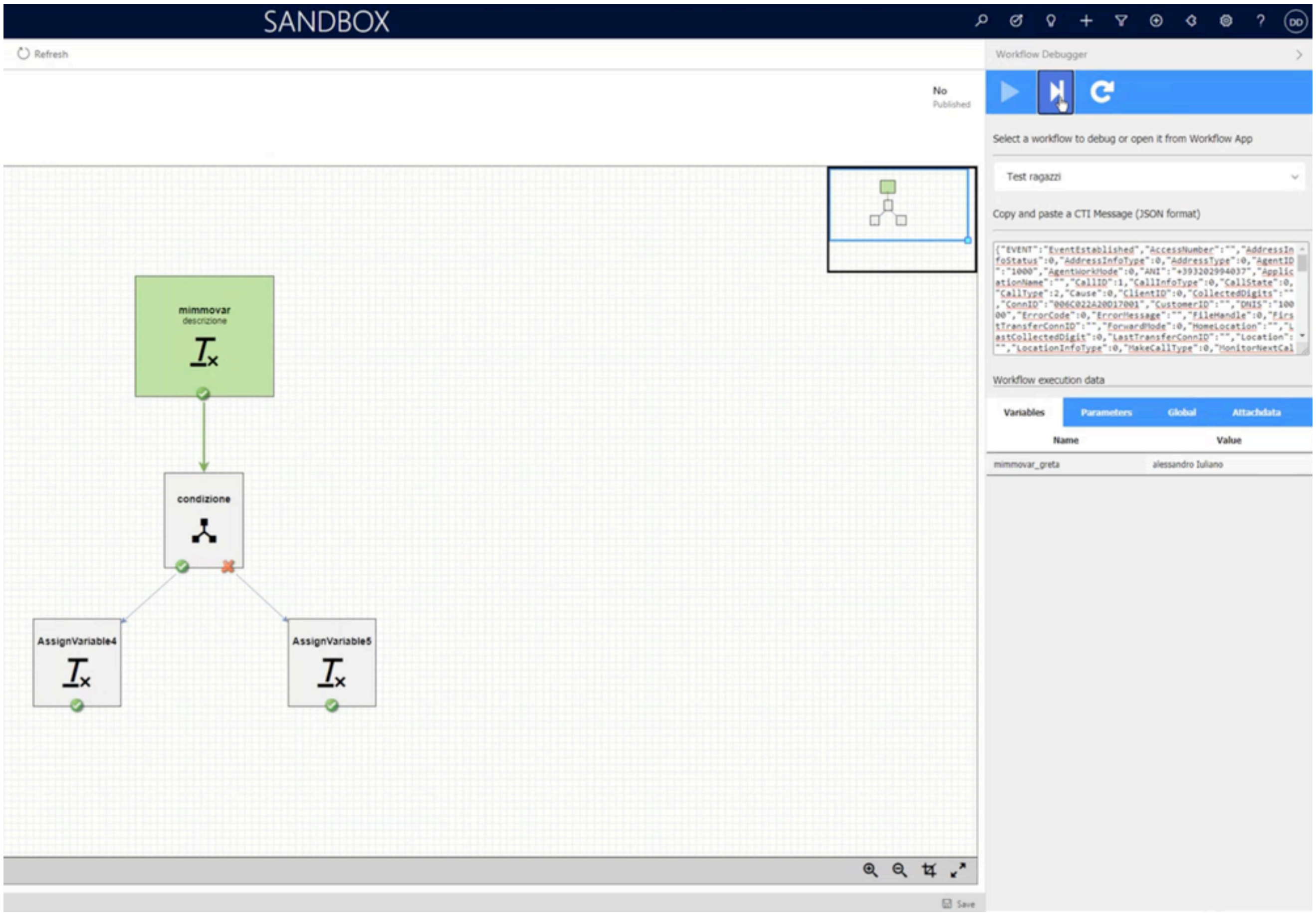
The Workflow Debugger has three controls:

Icon	Description
	Entirely runs the Workflow.
	Runs the Workflow step by step.
	Refreshes the Workflow.

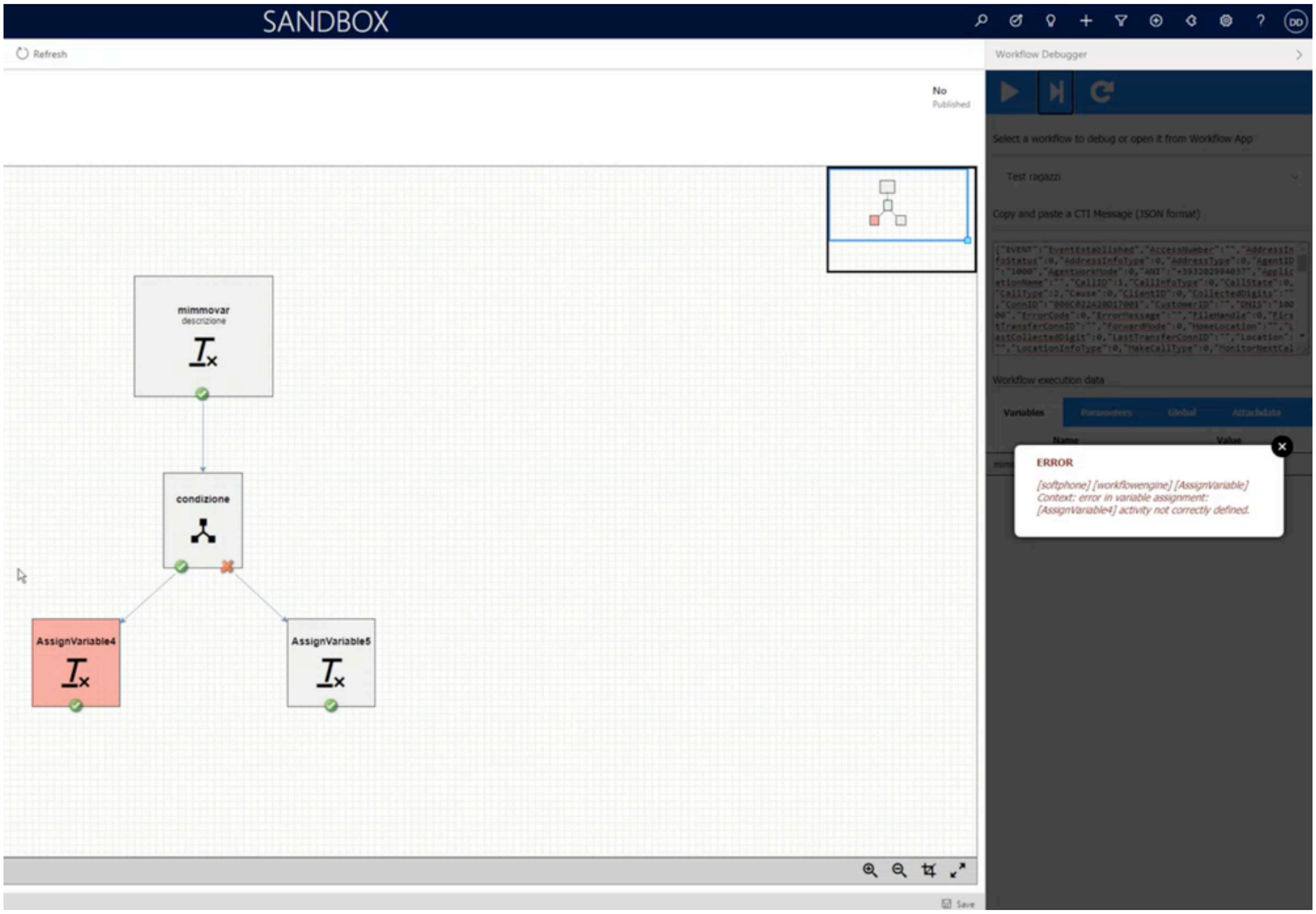
All created Workflows are visible in the list menu. You can switch from one to another just by selecting one.

Within the Execution Data section, you can check all parameters on which the Workflow can operate. When running Workflows step by step, the Workflow Debugger shows information dynamically evaluated for each step here.

All tested and working sections of the Workflow turn green.



In the case of an error, the incorrect sections are highlighted in red, while an error description is displayed on the right.



When you run a screen-pop test, you can return to the Workflow Designer:

- Either clicking **Workflow Editor App** in the upper left corner,
- Or reselecting the **wanted Workflow** from the Workflow Debugger list menu.