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Gplus Adapter for Microsoft Dynamics 365 Agent's Guide

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Gplus Adapter for Microsoft Dynamics 365

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- [1 Microsoft Dynamics 365 and Microsoft Unified Service Desk \(USD\)](#)
- [2 How can I use the Adapter as an agent?](#)

The Gplus Adapter for Microsoft Dynamics 365 provides integrated management of communication channels within the Microsoft Dynamics 365 CRM.

Important

What you see in the Gplus Adapter depends on your contact center and your role within it, so you might not be able to do or see all the things covered in this manual. If you think you should be able to do or see something that you cannot, check with your supervisor or system administrator.

Microsoft Dynamics 365 and Microsoft Unified Service Desk (USD)

The Gplus Adapter supports both **Microsoft Dynamics 365** and **Unified Service Desk (USD)**. There are some minor differences between how the Adapter works under Dynamics versus USD. These differences are noted in this document where the user experience is significantly modified.

How can I use the Adapter as an agent?

As an agent, you can use the Adapter to handle inbound and outbound calls without navigating away from your Microsoft environment. Here is a video introducing the Adapter's main features:

[Link to video](#)

Check out the topics below to explore more details.

- Adapter basics - Explains how to get quickly up and running with the Adapter.
- The click-to-call feature - Shows how to make connections easily by clicking to make a call.
- What are screen pops? - Describes how to see a contact record when you receive an interaction.
- Activity History for interactions - Helps to work with the Microsoft Dynamics 365 or USD Activity History records by adding details about the handled interactions.
- Performance Tracker - Explains how to check your statistics within the contact center.

Adapter basics

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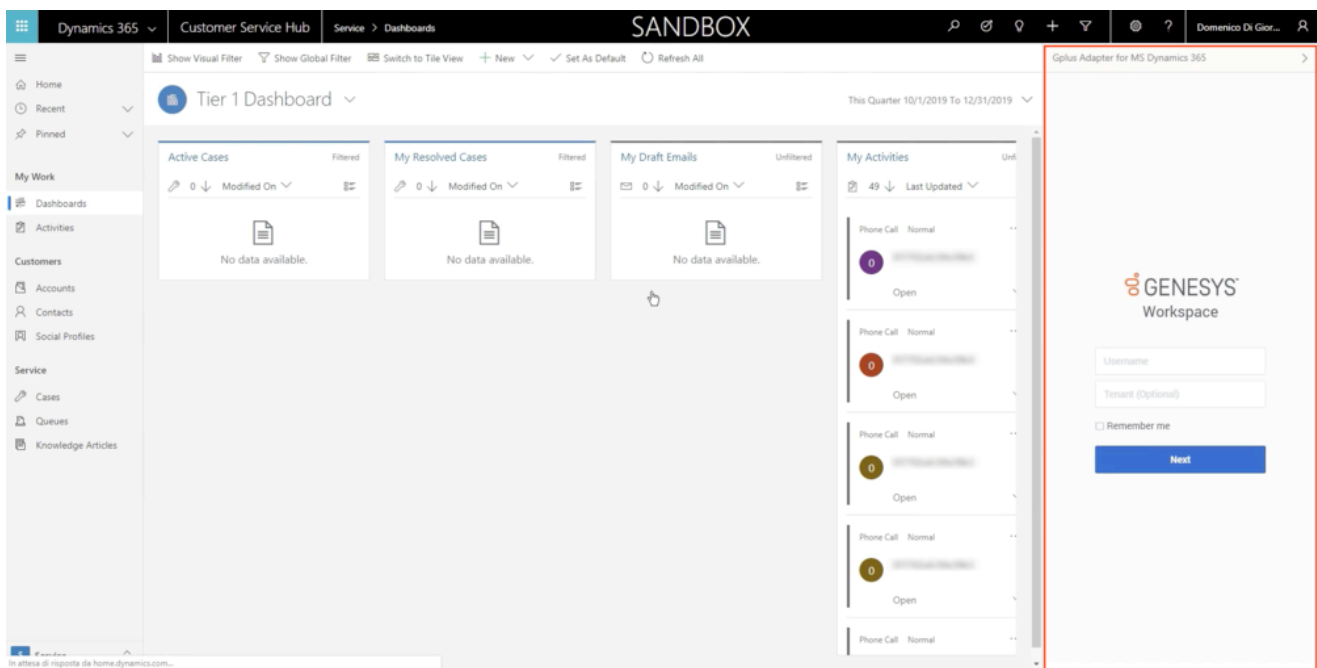
Logging in and getting ready to receive and make calls.

How do I log in?

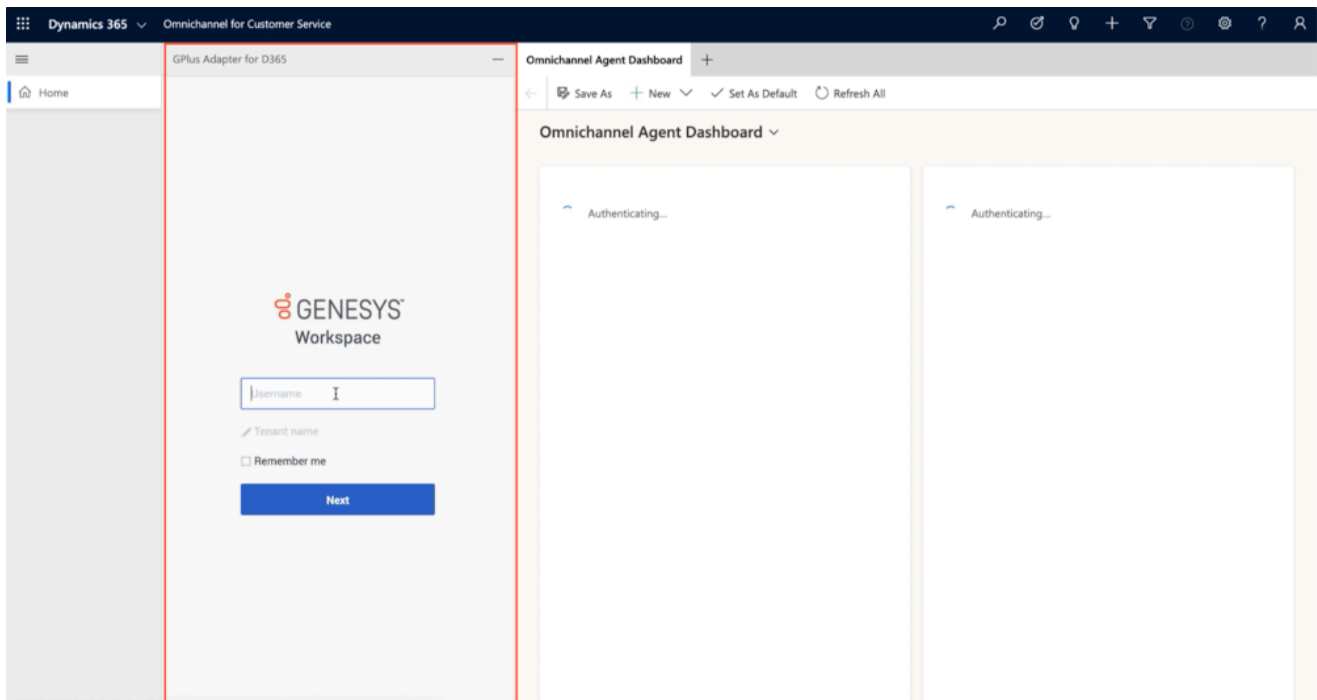
Using the Microsoft Dynamics 365 **Channel Integration Framework (CIF)**, the Gplus Adapter is loaded and displayed during the Dynamics login sequence. Log in to your Microsoft Dynamics 365 account, then continue logging into the Adapter.

Important

According to the Microsoft Dynamics 365 version you are using, the Adapter can be loaded either on the left or on the right side.



Adapter basics

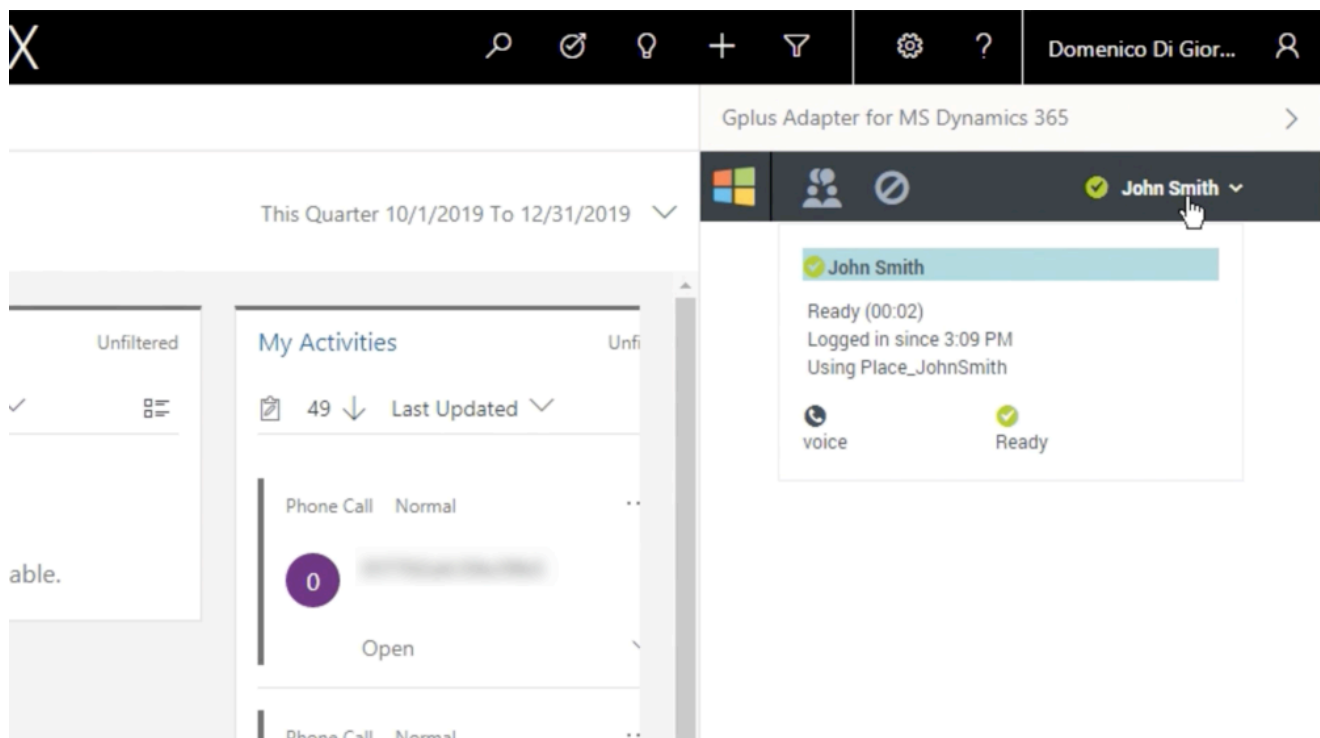


If you are prompted to log in, enter your Genesys username (such as an email address) and password and click **Log in**. If you have logged in previously, your username should already be entered and the login page should automatically insert your last known place. More often, you can accept the last known place before clicking **Log in**.

Main view

After logging in, the main view is displayed. From this view, you can **change your status** and make calls.

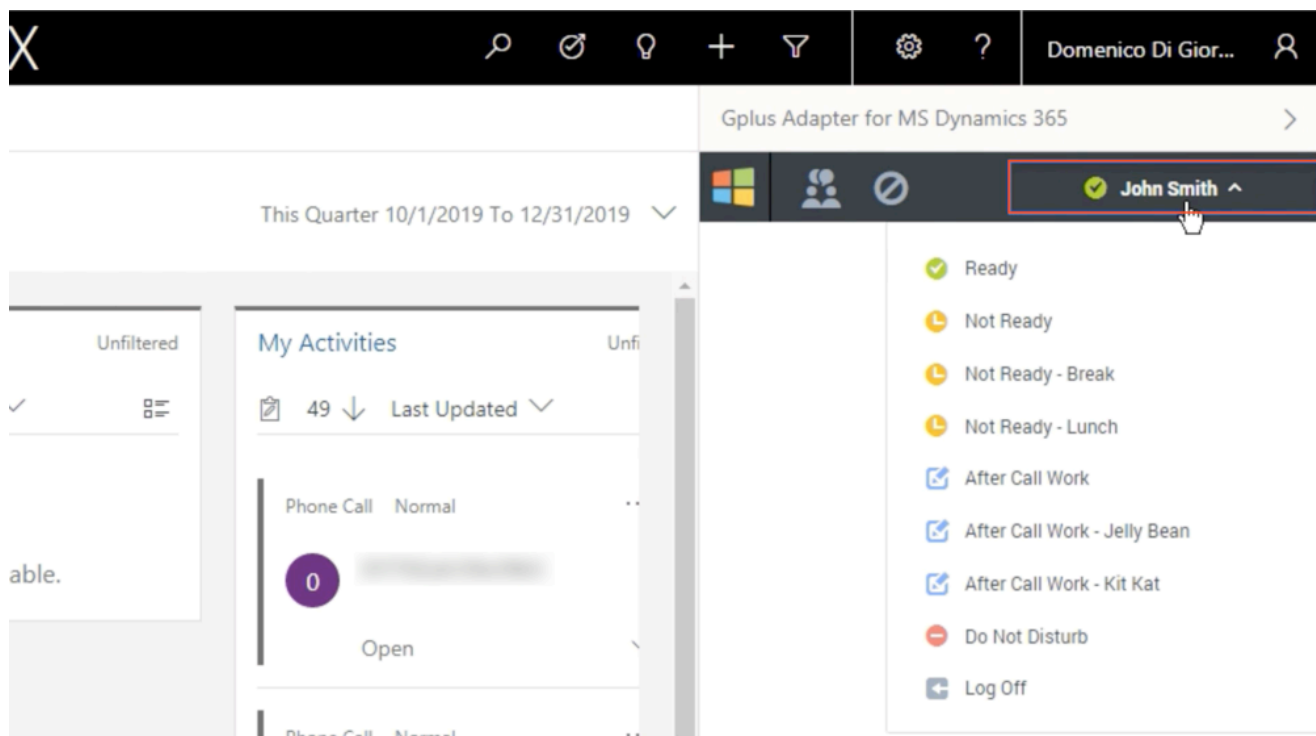
The Adapter displays your name on the upper right. Click it to verify information about yourself: your current status, the duration of your status, your particular place, and your login time.



When you first log in, notice that your agent status is set for you — for instance, it could be **Not Ready**. To change your status, click your name; you can choose among:

- **Ready**,
- **Not ready** with or without reason,
- Do Not Disturb,
- **Log Off**.

Log Off enables you to log out of Genesys but remain connected to the Adapter.

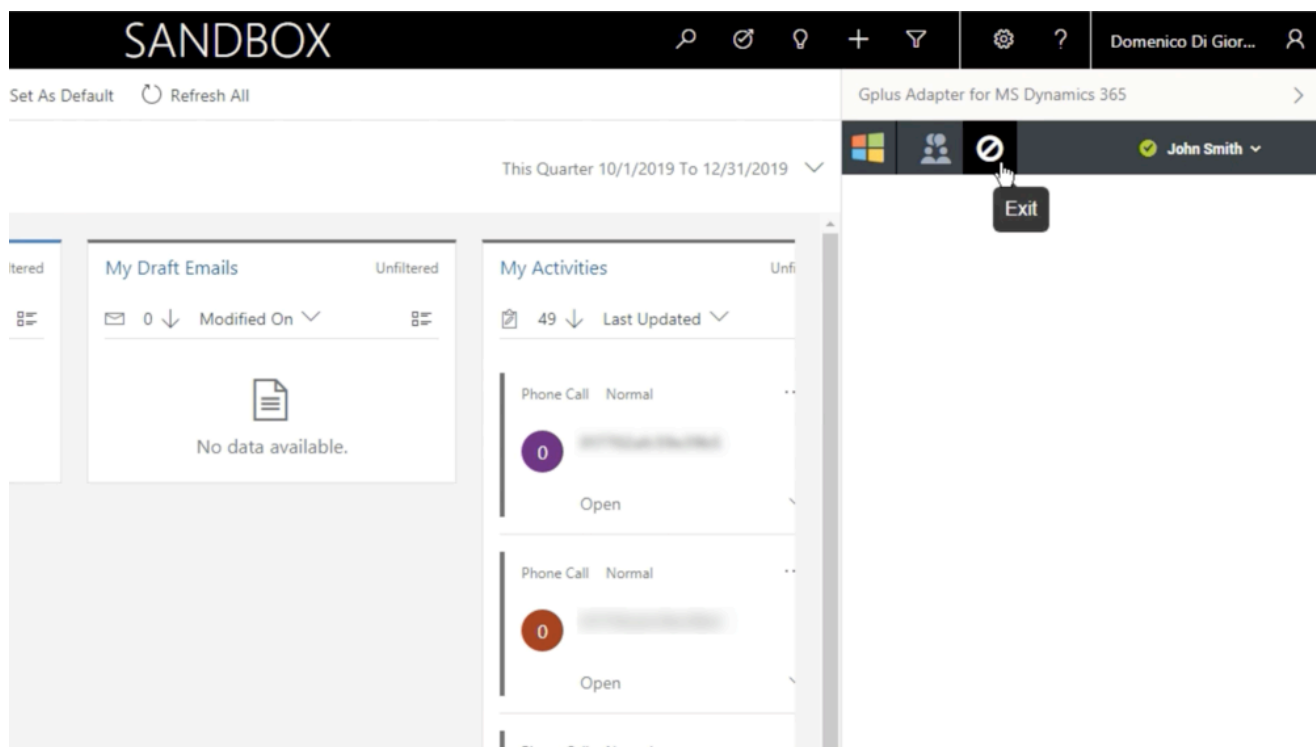


Your system administrator determines the default status you find at your first login either for the whole contact center or agent group or specifically for you. If your status is not already set to **Ready**, change it to receive inbound calls.

You can check your statistics within the contact center at all time through the Performance Tracker.

How do I log out?

To log out from all channels and sign out of the Adapter, click the menu button and then select **Exit**.



The Adapter returns you to the login page; you must enter your credentials to log in again. When you log out, ensure that your interactions are completed before logging out from Microsoft Dynamics 365 or Unified Service Desk (USD) and closing your browser or application window.

If there are any active calls, you cannot sign out: when trying, an error message is displayed. You must click **OK** before you can continue working with the Adapter.

Session and application tab panels

Important

This section only applies to **Microsoft Dynamics 365 with Channel Integration Framework (CIF) version 2.0**.

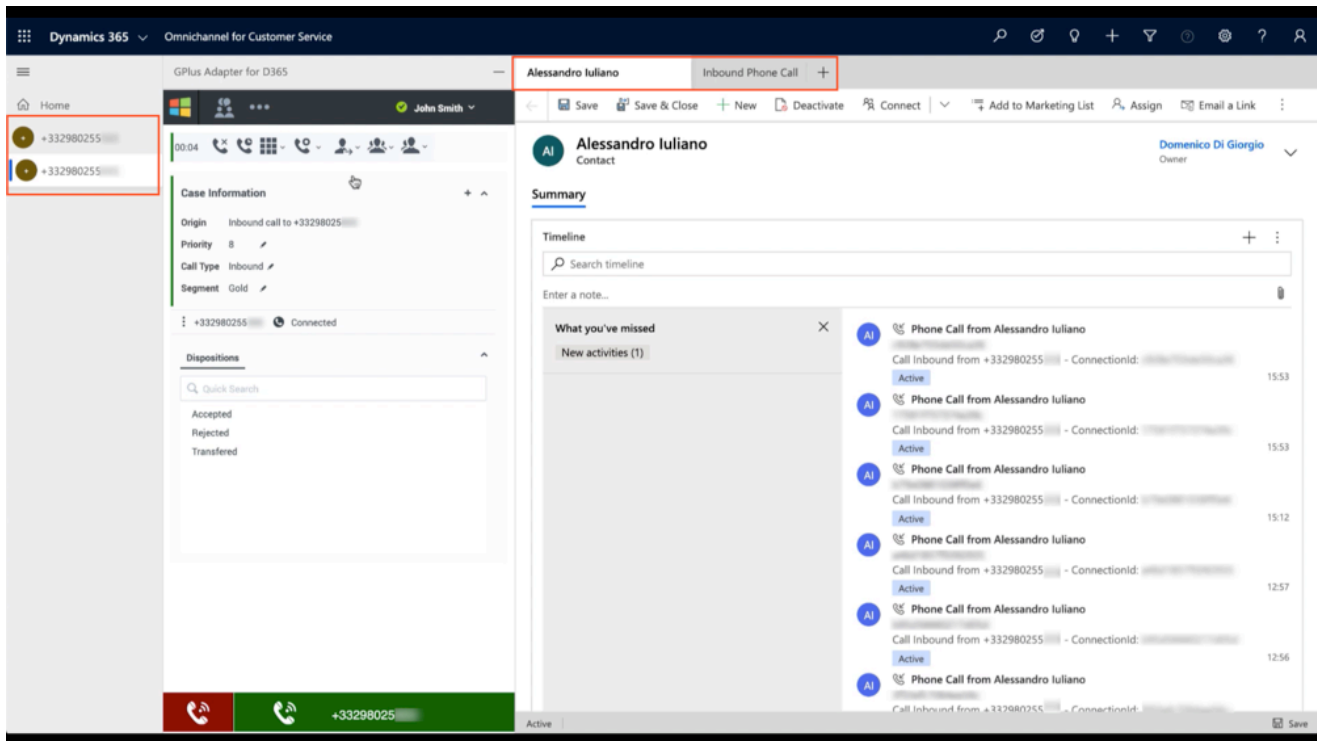
With the Gplus Adapter for Microsoft Dynamics 365, you can use the key feature provided by the Channel Integration Framework (CIF): the multi-session and application management.

The horizontal bar below the navigation one is called the **application tab panel**. When you accept or make a call, a new Interaction record is opened in a new tab for that session. If the contact is known, its record is opened in a further tab of that session.

The vertical panel on the left side, the **session panel**, allows you to work on multiple sessions catering to different customers simultaneously. You can manually switch across these sessions

Adapter basics

without losing the context of the conversation and customer details and close them as needed. Whenever you click a session, the relative tabs are displayed on the right.



If you want to learn how to work with the Adapter, continue to Access and supported channels.

Access and supported channels

Contents

- [1 How do I access the Adapter?](#)
- [2 Supported channels](#)

The Gplus Adapter for Microsoft Dynamics 365 enables you to handle Genesys contact center functions from Microsoft Dynamics 365 or Unified Service Desk (USD).

How do I access the Adapter?

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

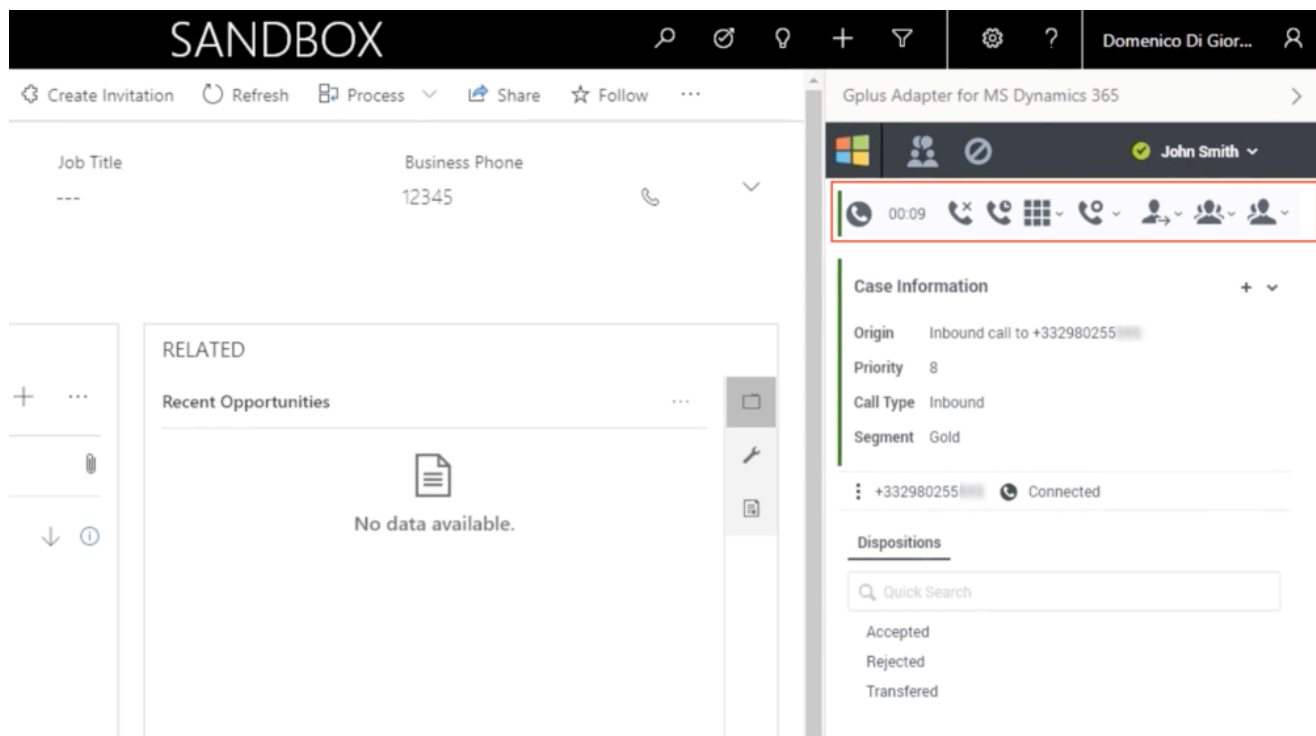
For more information about this topic, see [Adapter basics](#).

Supported channels

The Adapter currently supports the **voice channel** and **workitem**. It provides you with controls and features that let you handle voice interactions with contacts or internal targets (such as other agents).

Voice Channel

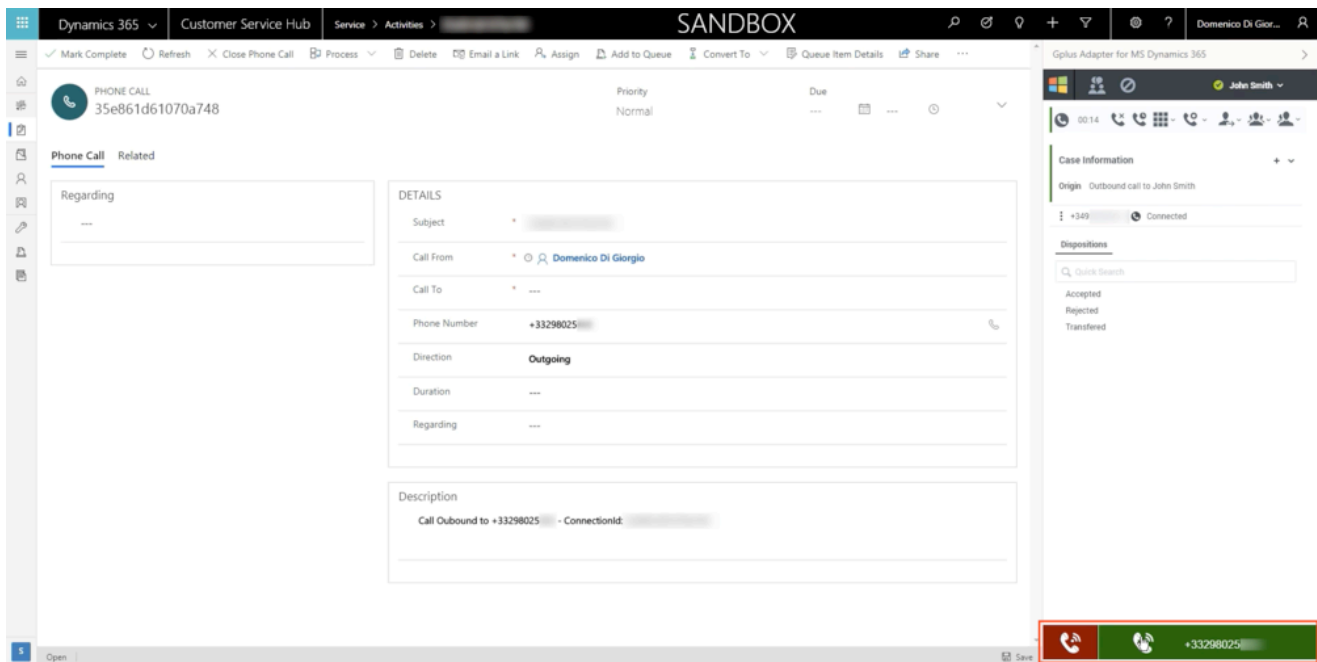
Once you have an active call — because you called someone or accepted an incoming call —the main view changes to the **active call toolbar**. It is visible at the top of the Adapter and displays all applicable call controls and a timer for the active interaction.



Call controls include:

Icon	Function	Description
	Release call	Ends the call.
	Hold call	Places the call on hold. After the call is holding, the Retrieve button is displayed.
	Direct transfer	Redirects the call to another contact you select using Team Communicator.
	Conference	Instantly starts a voice conference with the current caller and another contact that you select using Team Communicator.
	Consultative transfer	Start a consultation with another contact before transferring the call to that contact.

In the case of multiple interactions simultaneously, you can click the **phone icon** at the bottom of the Adapter to verify each call's status. A green bar indicates an active interaction; inactive calls are characterized by a red bar.

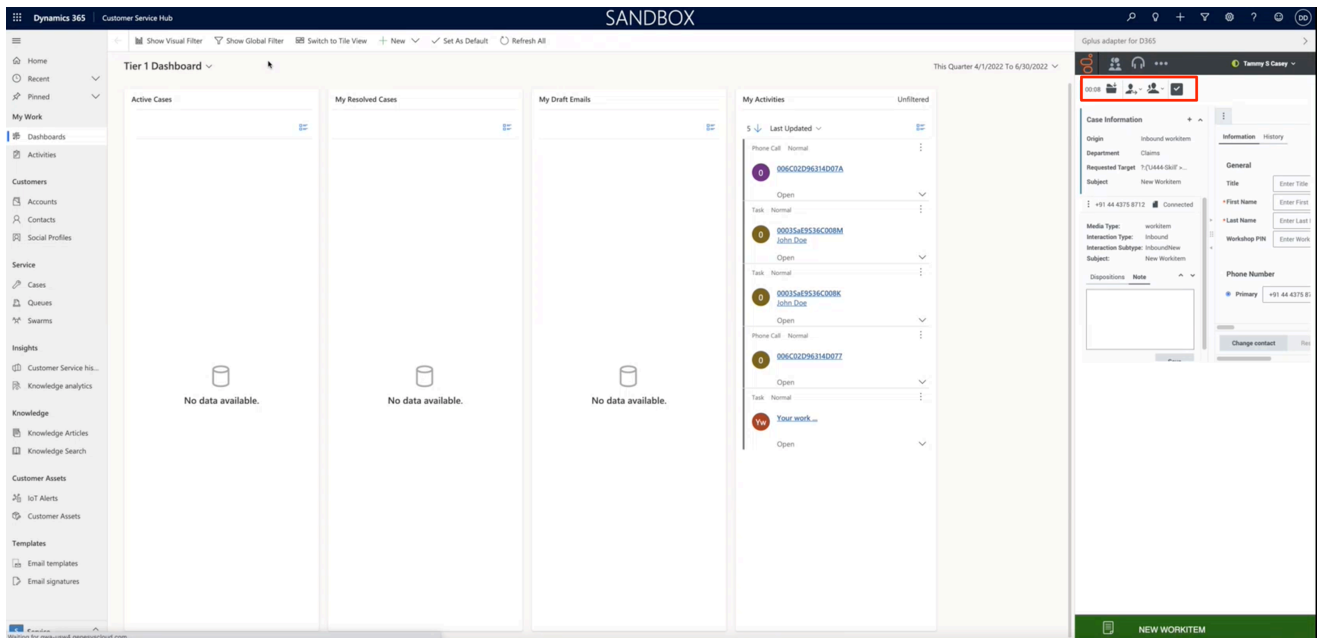


If you wish to learn how to handle incoming calls with the Adapter, see [How to manage inbound calls](#).

Workitem channel

After you log in and make yourself available, you can receive inbound WorkItem from the queue. When the Gplus Adapter alerts you of an incoming WorkItem, you receive a toaster notification with the **information about the WorkItem interaction**. WorkItems can transport arbitrary information depending which type of entity they represents. In the below example the notification displays:

- the customer phone number
- the Department
- the type of WorkItem (inbound workitem)
- the WorkItem subject



Workitem controls include:

Icon	Function	Description
	Mark done	Close the interaction
	Transfer	Blind transfer of workitem to another agent or queue
	Consulting	Allow to consult another agent to manage the interaction

If you wish to learn how to handle incoming calls with the Adapter, see [How to manage workitem inbound](#).

How to manage inbound calls

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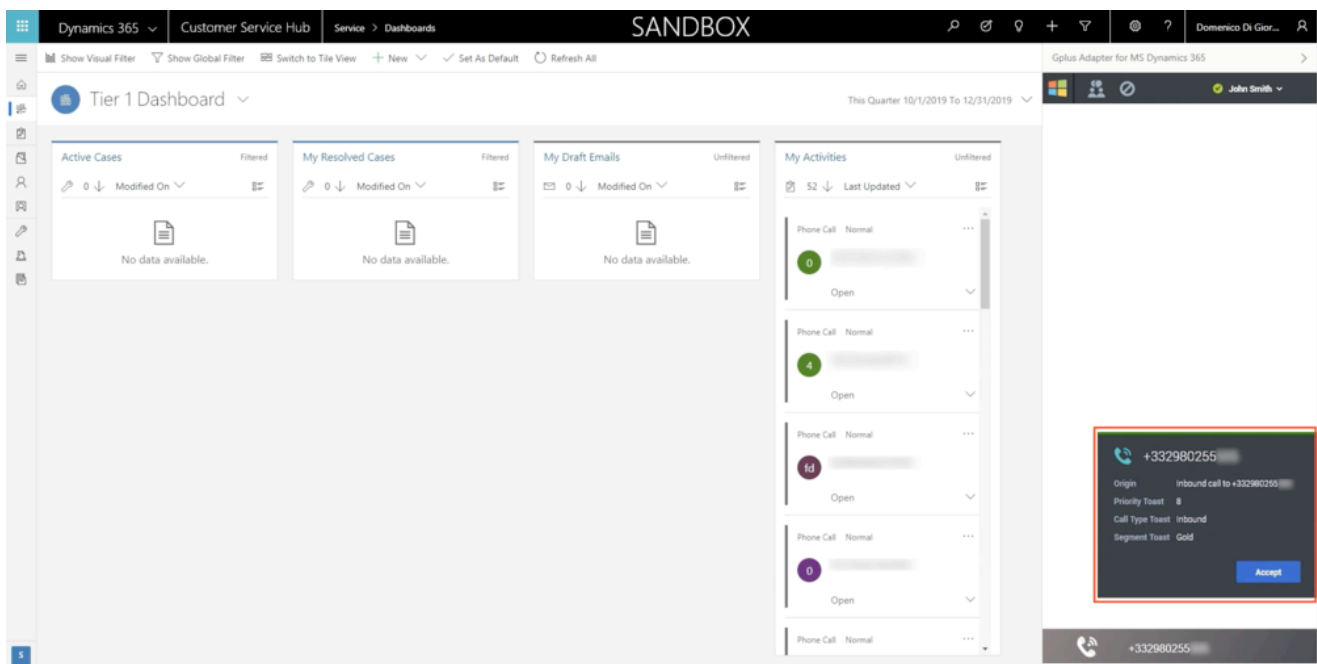
- [1 Inbound calls from a known contact](#)
- [2 Inbound calls from an unknown contact](#)

What you must know to handle incoming calls from known and unknown contacts.

Inbound calls from a known contact

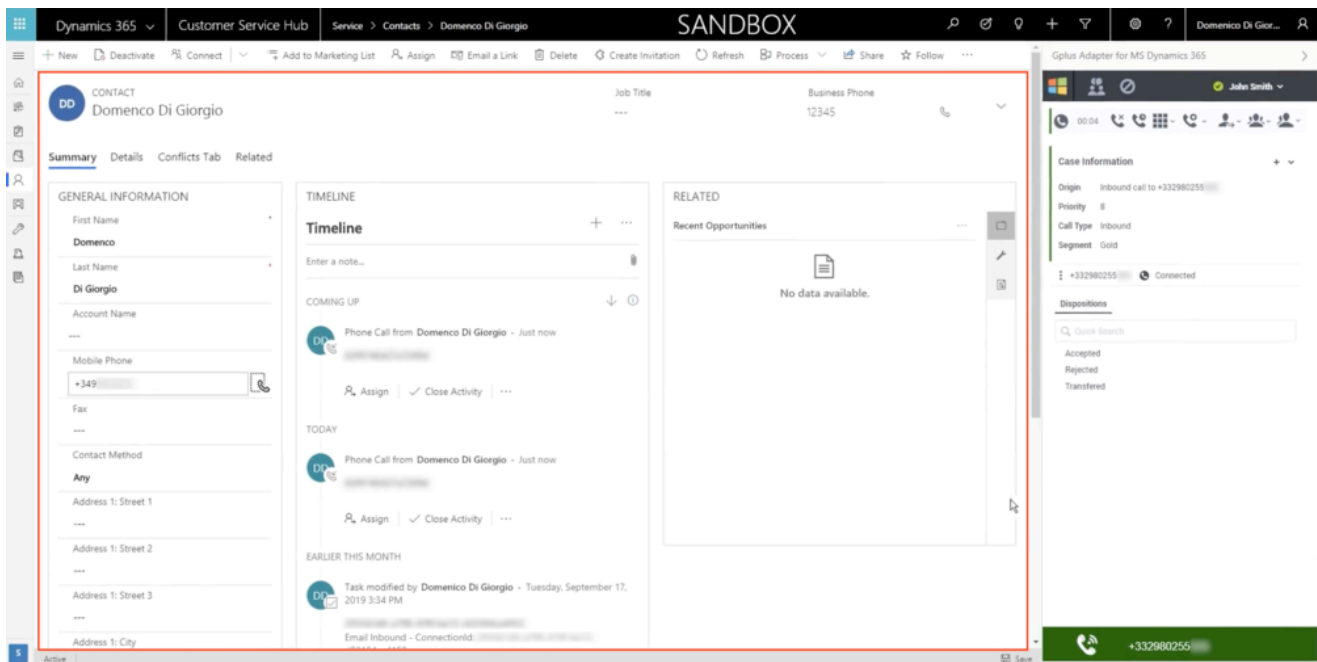
After you log in and make yourself available, you can receive inbound calls from the queue. When the Gplus Adapter alerts you of an incoming interaction, you receive a toast with **information about the call**. This information can include:

- The customer phone number,
- The phone number the customer dialed,
- The type of call,
- Any additional data to identify the customer or the call.



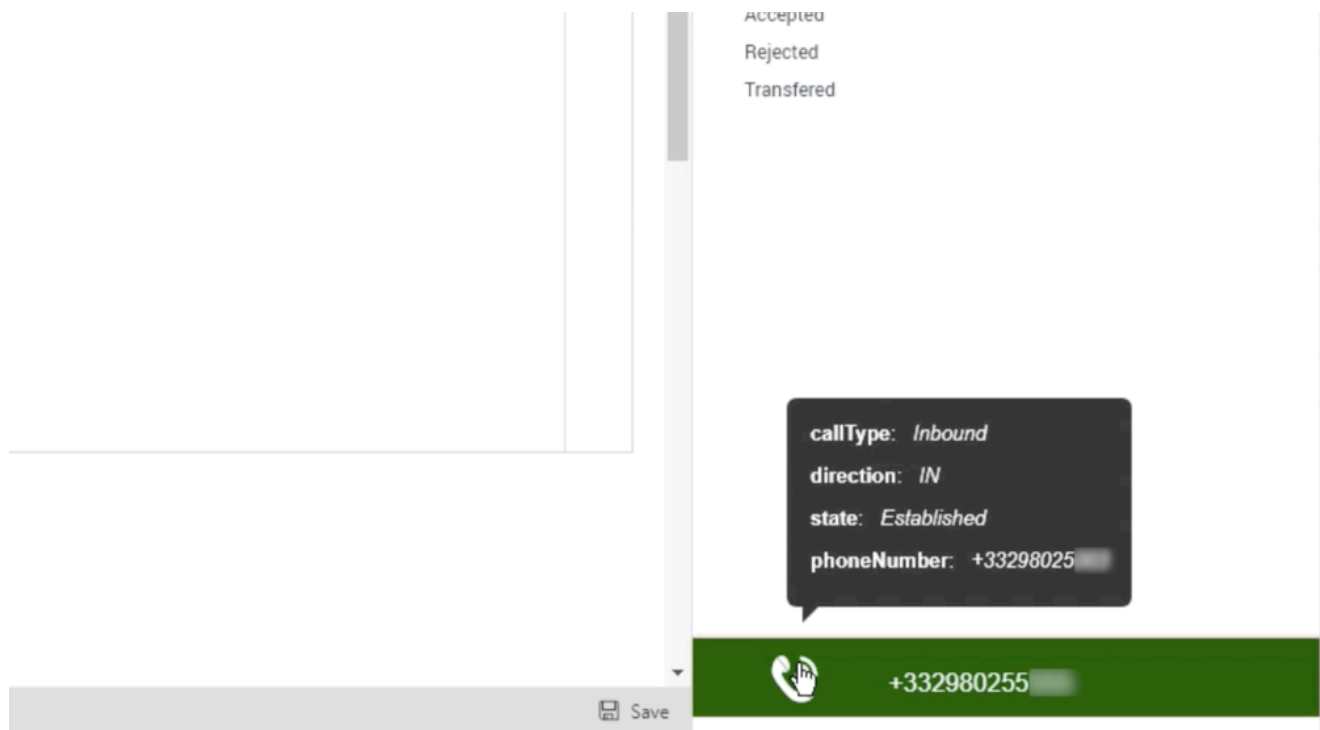
To answer the call, click **Accept**. When you accept an already known customer's interaction, you receive a Microsoft Dynamics 365 or Unified Service Desk (USD) screen pop of the record that matches the caller's contact information. If you want to learn more about screen pops, see [What are screen pops](#).

How to manage inbound calls



Below the call controls, the Adapter shows the **Case Information section**, where you can examine the call's information. Your system administrator determines the access and content of the Case Information section. You can also set the **Dispositions** of the call.

To discover more information about the interaction, click the **phone icon** at the bottom of the Adapter: the type and direction, the state of the call (for example hold or release), and the telephone number.



On top of that, an **Activity History of type Call** containing all information available about the interaction is automatically created. For more information about Activity History records, see Activity History for interactions.

Important

In **Microsoft Dynamics 365 with CIF version 2.0**, this Activity History of type Call is also shown in another tab of that session.

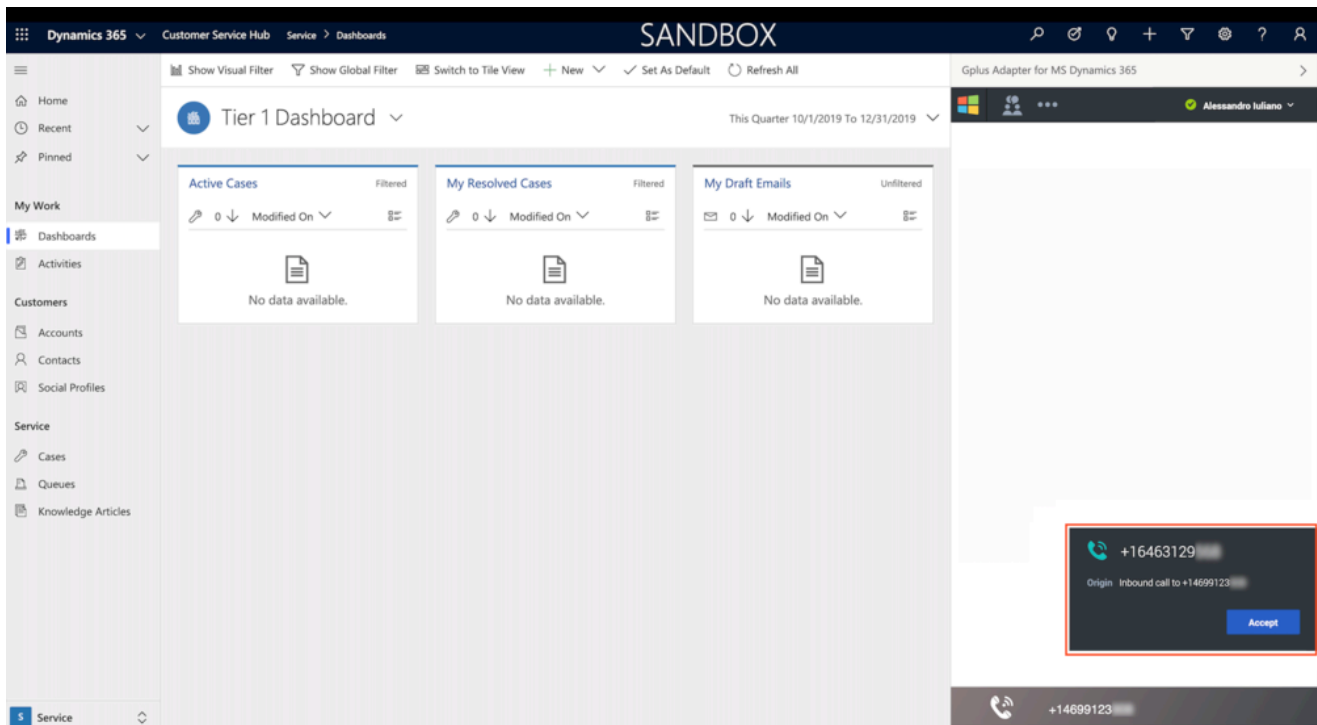
The interaction remains active until you mark the call **Done**. Remember, you can't sign out if there are any active interactions. To learn more about logging out, see Adapter basics.

Inbound calls from an unknown contact

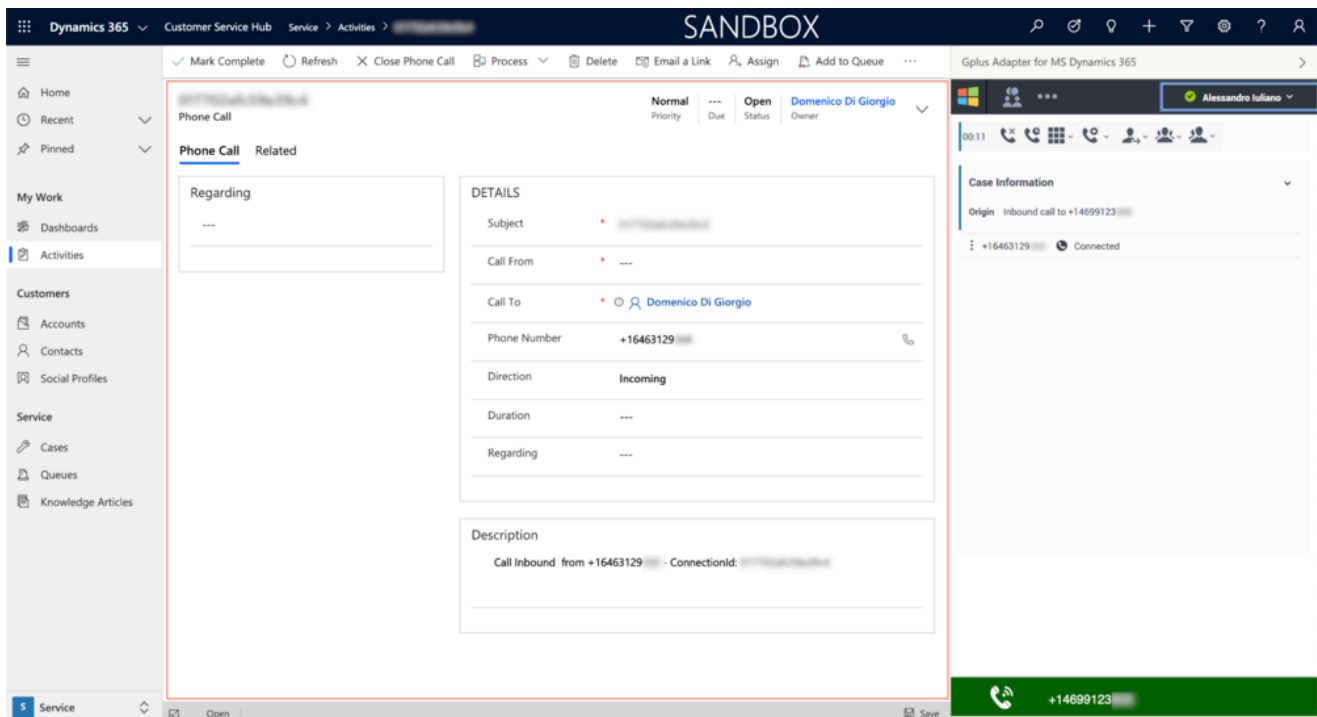
The procedure is similar to the previous case, but with a few differences.

When the Adapter alerts you of an incoming call, you receive a toast with **information about the interaction**. Your system administrator configures this information.

How to manage inbound calls



After clicking **Accept**, you receive a Microsoft Dynamics 365 or USD screen pop with an **incoming Activity History of type Call** containing all information available about the interaction. If you want to learn more about screen pops and Activity History records, check [What are screen pops and Activity History for interactions](#).



The interaction remains active until you mark the call **Done**. Remember, you cannot sign out if there are any active interactions. To learn more about logging out, see [Adapter basics](#).

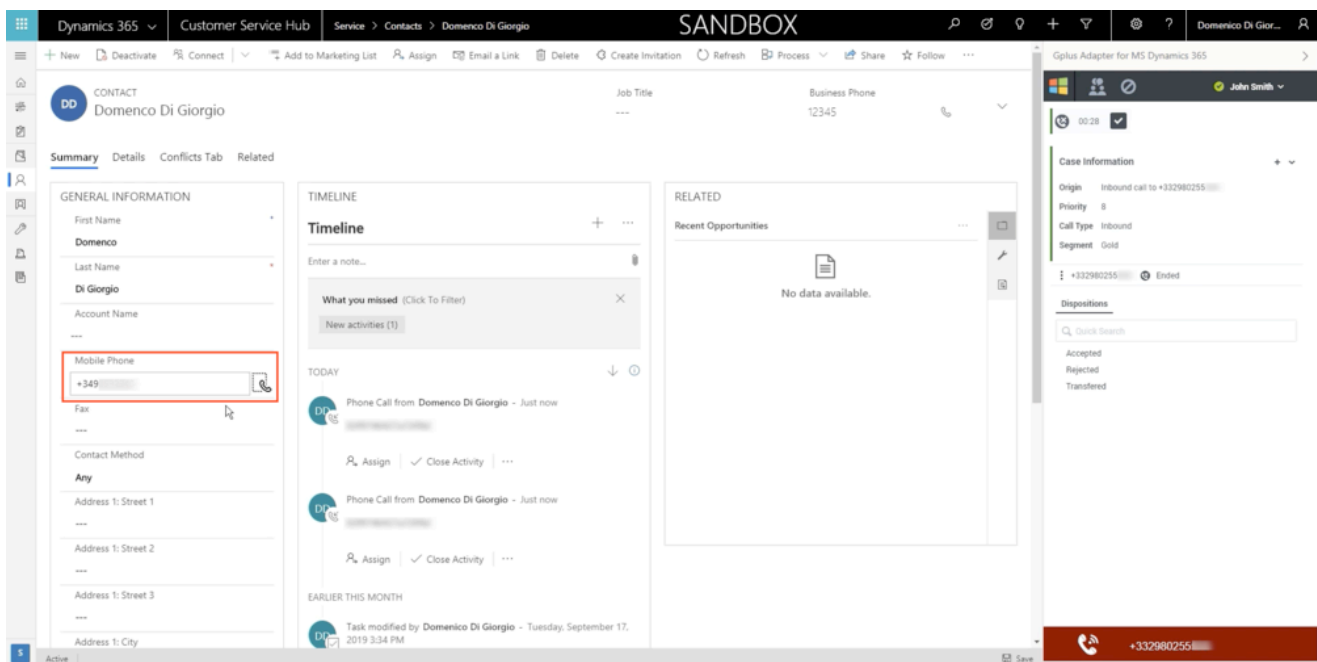
If you want to handle outgoing interactions, proceed to [How to handle outbound calls](#).

How to handle outbound calls

All you need to know to manage outgoing calls.

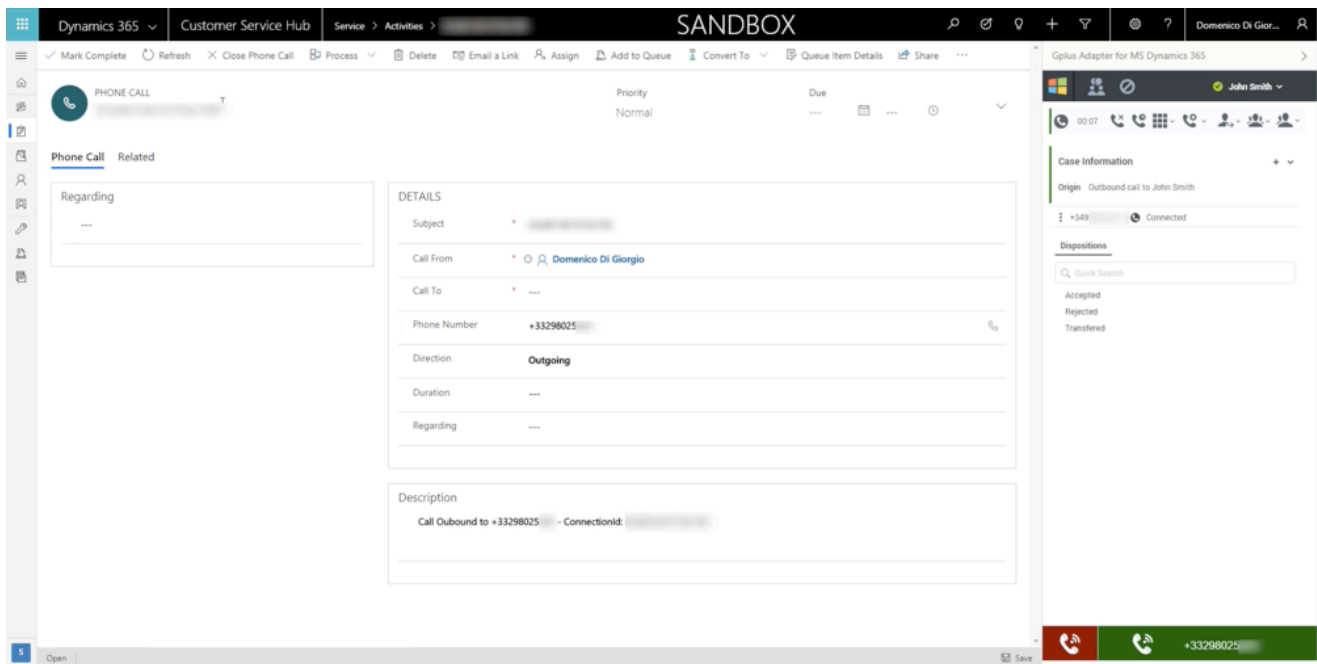
Besides receiving incoming calls, you can equally perform outbound interactions. However, you can only make outgoing calls to records already existing in Microsoft Dynamics 365 or Unified Service Desk (USD). If you want to call a brand-new contact, you need first to register it within the CRM.

You can make outbound calls just clicking the **phone icon** next to the selected contact telephone number. For more information about the click-to-call feature, see [The click-to-call feature](#).



When the outbound call connects, you receive a Microsoft Dynamics 365 or USD screen pop with an **outgoing Activity History of type Call**.

How to handle outbound calls



To learn more about screen pops and Activity History records, see [What are screen pops and Activity History for interactions](#).

The click-to-call feature

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- [1 Using click-to-call](#)

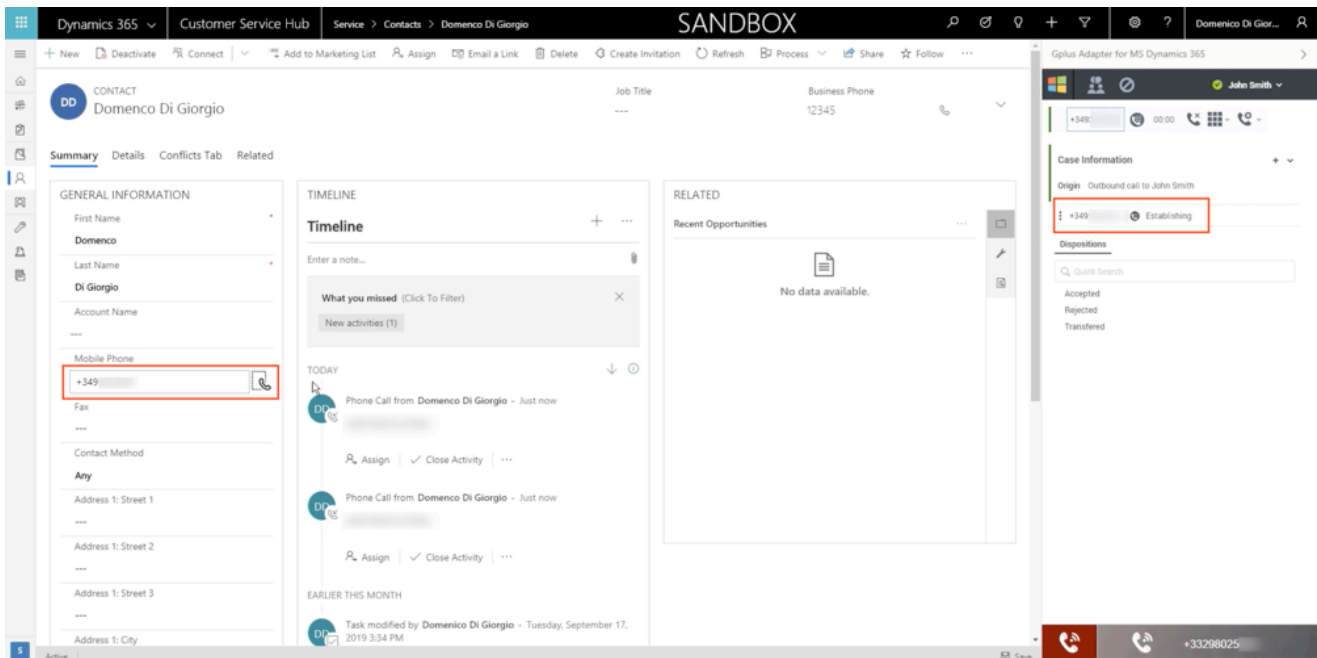
The click-to-call feature

Click-to-call makes connecting to your customers easy.

The click-to-call feature enables you to have the Gplus Adapter automatically dial a call when you click a phone number in Microsoft Dynamics 365 or Unified Service Desk (USD).

Using click-to-call

With the click-to-call feature, all you have to do is click the **phone icon** next to a telephone number within Microsoft Dynamics 365 or USD, and the Adapter automatically dials it and starts the call. For example, you can search for a contact in Dynamics or USD and then click the corresponding phone number in the search result to dial the call.



What are screen pops?

When you receive an interaction, a contact record pops up in Microsoft Dynamics 365 or Unified Service Desk (USD).

Screen pops are Microsoft Dynamics 365 or Unified Service Desk (USD) records or other objects displayed when an agent receives a call in the Gplus Adapter. Dynamics might display one or more related records, depending on what information it has about the contact.

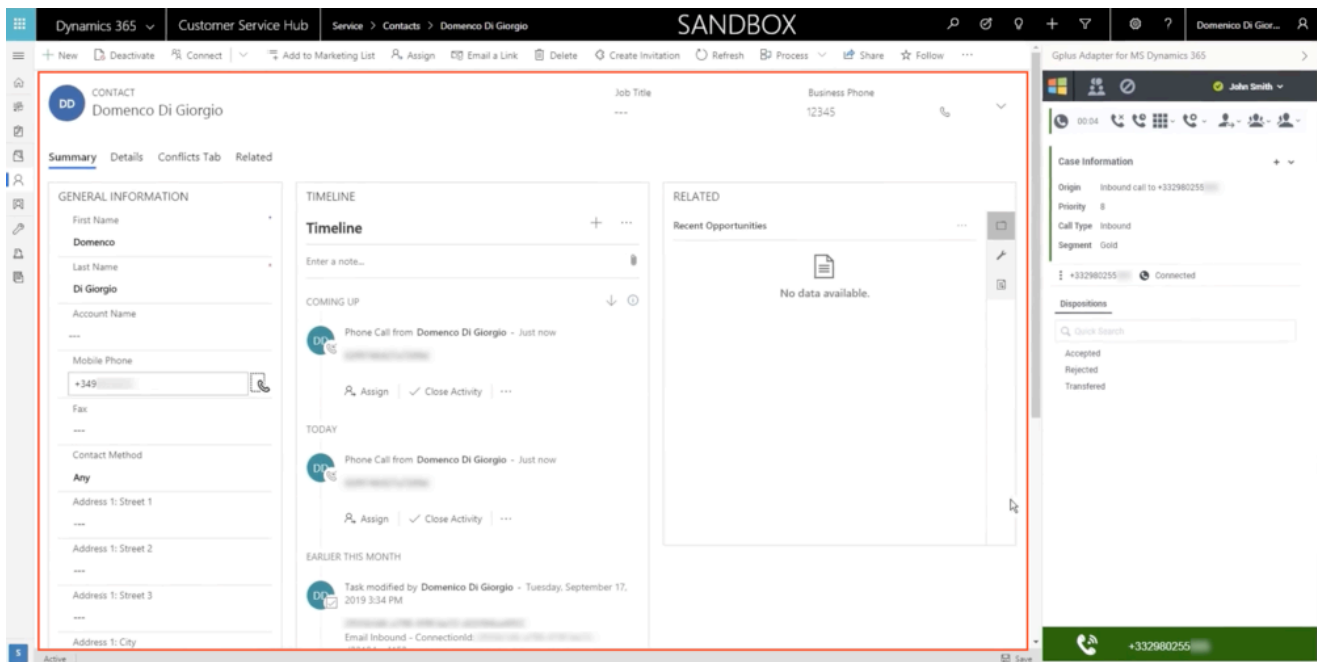
Your system administrator manages and customizes screen pops. Here is how they typically work in an out-of-the-box scenario.

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

Important

In **Microsoft Dynamics 365 with CIF version 2.0**, this Activity History of type Call is also shown in another tab of the active session. For further information on session and application tab panels, check Adapter basics.

What are screen pops?

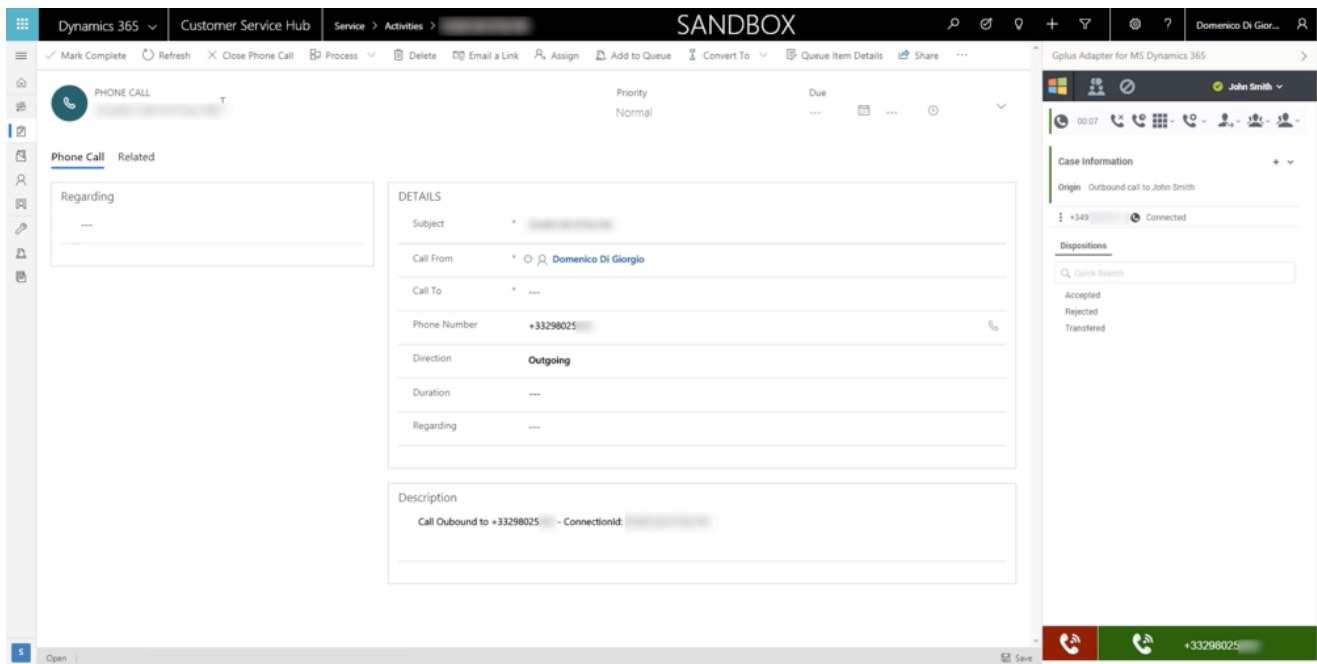


For outgoing calls, when the interaction connects, you receive a Microsoft Dynamics 365 or USD screen pop with an **outbound Activity History of type Call**, which will also be available on the related contact landing page.

Important

In **Microsoft Dynamics 365 with CIF version 2.0**, this Activity History of type Call is also shown in another tab of the active session. For further information on session and application tab panels, check Adapter basics.

What are screen pops?



To learn more about Activity History records, you can read [Activity History for interactions](#).

Activity History for interactions

The Gplus Adapter works with the Microsoft Dynamics 365 or Unified Service Desk (USD) Activity History records by adding details about the interactions you handle.

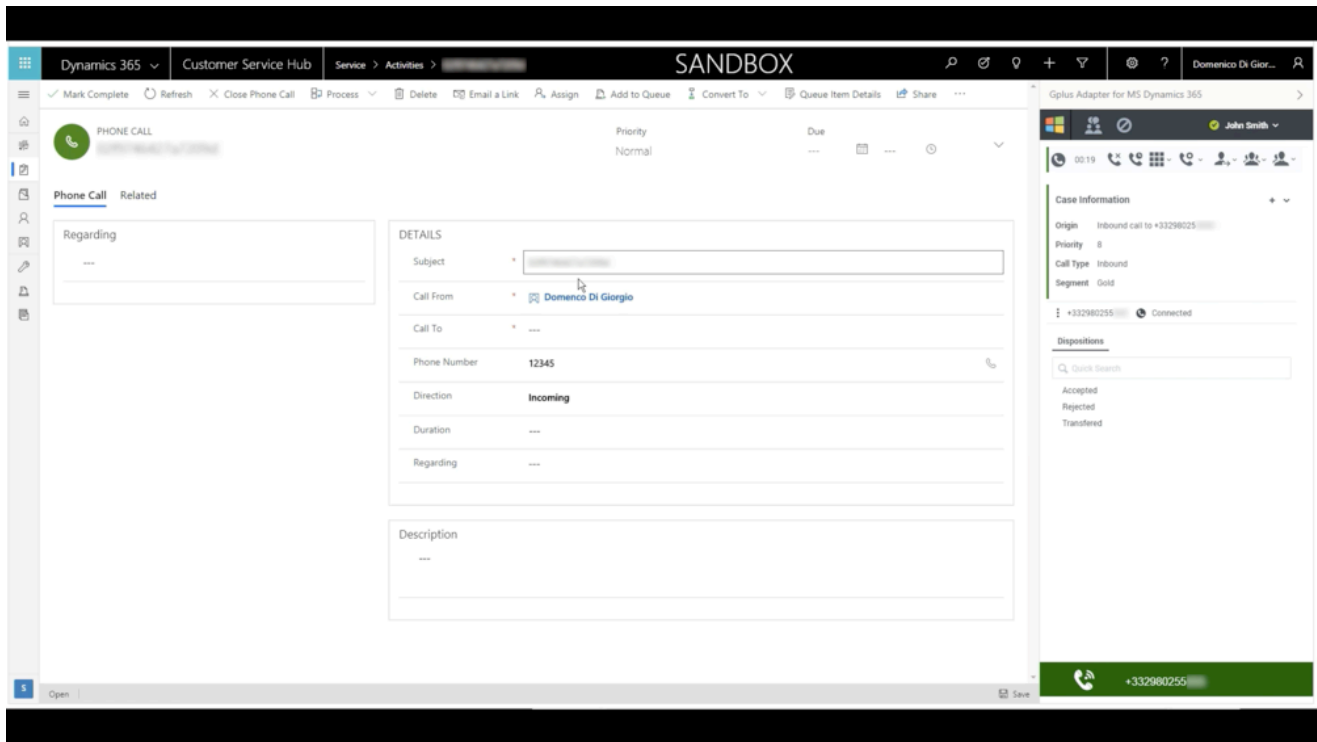
The screen pop you receive when you accept or make a call equally creates a new Activity History of type Call.

Important

In **Microsoft Dynamics 365 with CIF version 2.0**, this Activity History of type Call is also shown in another tab of the active session. For further information on session and application tab panels, check Adapter basics.

If Microsoft Dynamics 365 or Unified Service Desk (USD) recognizes the **Automatic Number Identification (ANI)**, the Activity History is linked to the **known contact**.

Activity History for interactions



View the table below for an extensive list of Microsoft Dynamics 365 fields included in each Activity and their description.

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

The Gplus Adapter allows seeing the content of the **Genesys interaction** directly from the Activity automatically created.

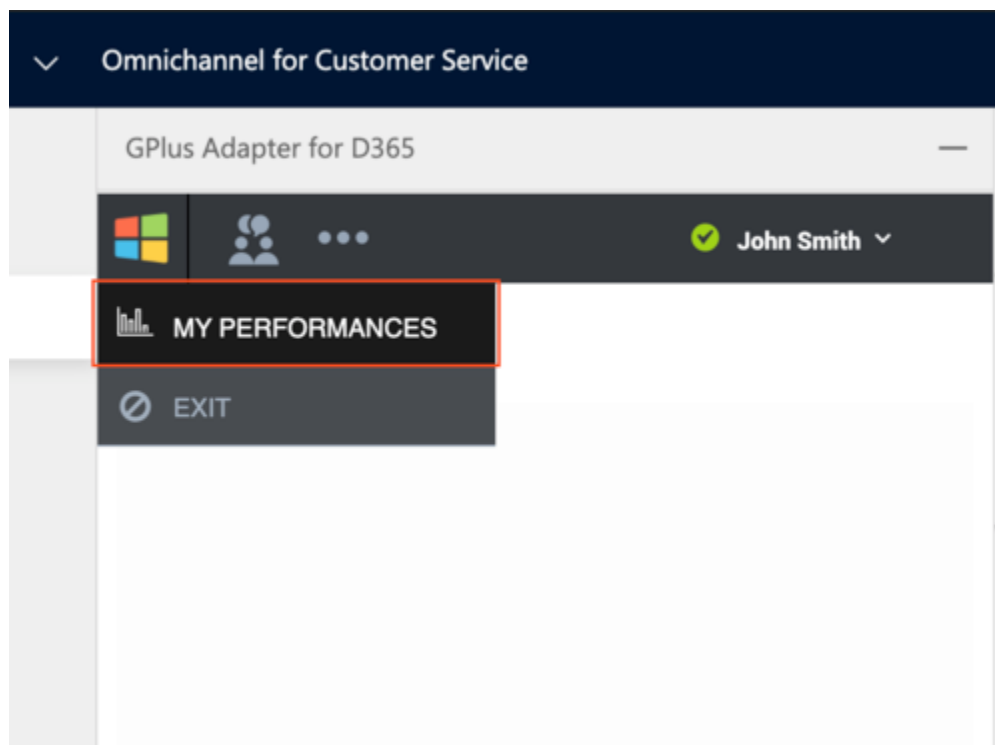
To learn more about screen pops, check [What are screen pops](#).

Performance Tracker

The Performance Tracker helps you check your statistics within the contact center.

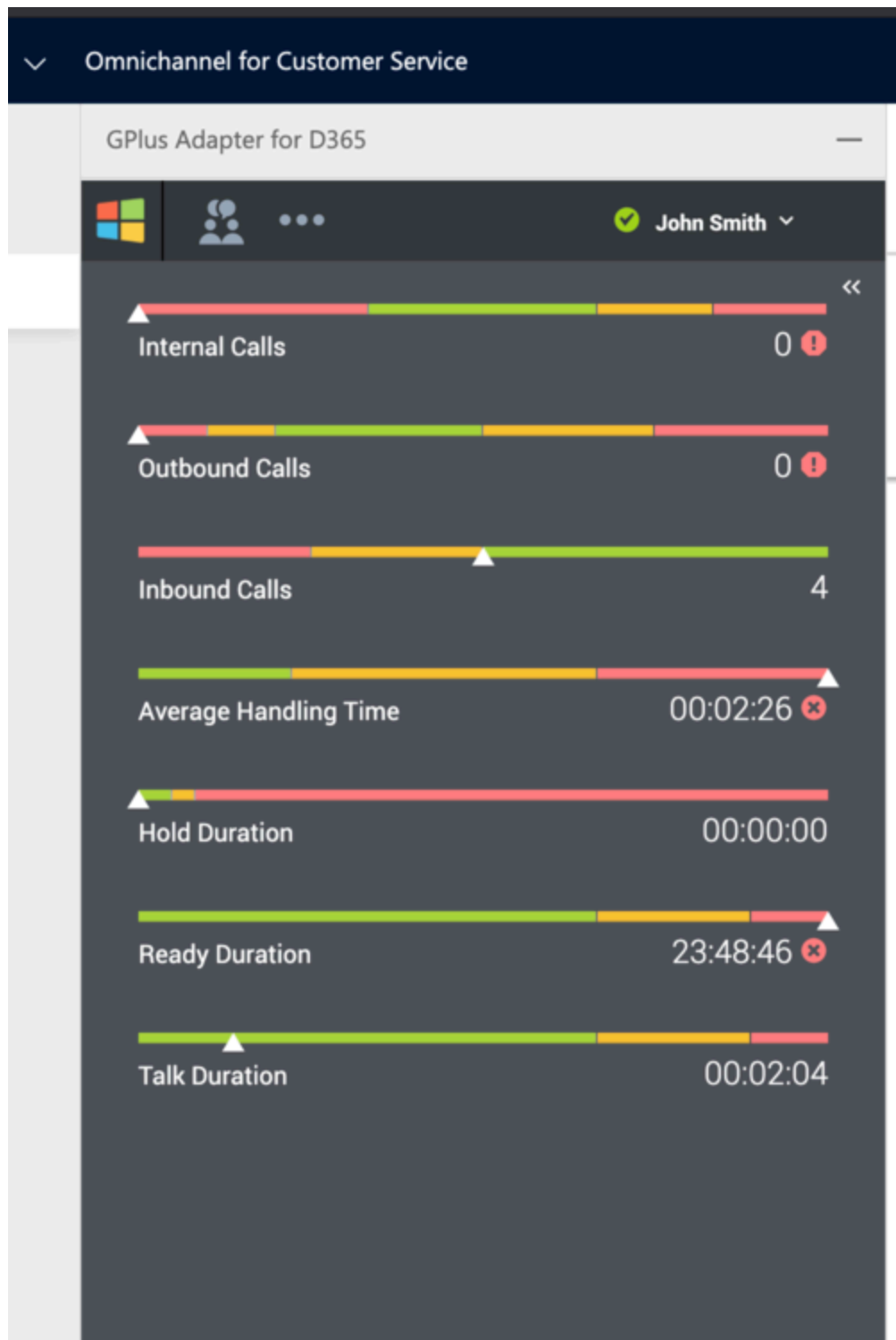
While the Gplus Adapter's main view lets you access the most common tools you use every day, such as handling calls and changing your status, there is a supported feature that allows you to view and track your performance: the Performance Tracker.

You can reach the Performance Tracker by clicking the **three-dot icon** on the main bar and then selecting **Performance**. However, your system administrator can customize this view.






The Performance-Tracker view displays a list of your **Key Performance Indicators (KPIs)** set up by your system administrator.

Your KPIs are shown as tri-colored bars with a white triangle indicating your standing. The name of the KPI appears exactly below the bar. If you do not satisfy one of your KPIs, the white arrow points to **yellow** and **red**. When you are fulfilling them, the white arrow moves to **green**.



Each statistic also displays the statistic value under the colored bar to indicate your current value for that data point. If you receive any warnings, they are presented next to your statistic value in the form of icons:

Icon	Name	Description
	Worst icon	Displayed if your performance evaluation is below the expected worst level for that KPI or contact center statistic.
	Error icon	Displayed if your performance evaluation is below the expected error level for that KPI or contact center statistic.
	Warning icon	Displayed if your performance evaluation goes beyond the expected warning level for that KPI or contact center statistic.