



Dynamics 365 Contact Center

Private Preview Guide

Last update: May 15, 2024

Note: Everything is under NDA, unless otherwise stated; Invite Only

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Overview

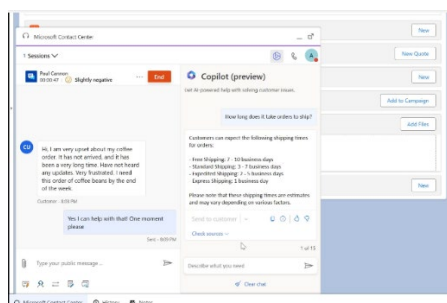
Goal

The goal of this document is to help you get started with the Microsoft Omnichannel Add-on (*naming to be confirmed*) private preview.

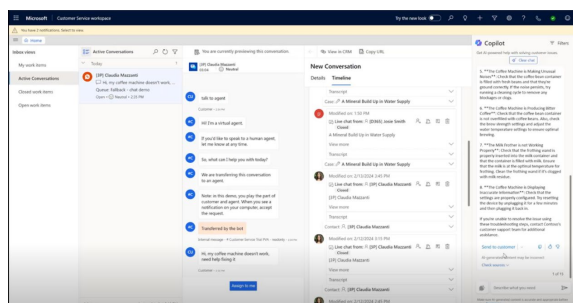
What is Microsoft Omnichannel Add-on

Engagement with customers continues to be revolutionized with the power of Generative AI across all channels of communication. Microsoft Omnichannel Add-on is an AI-first contact center from Microsoft that works with any CRM or 3P solution, allowing customers to use Dynamics 365 Omnichannel (OC) with AI capabilities with a CRM of the customer's choice. It uses the Dynamics Contact Center Platform (DCCP) infrastructure and provides additional platform components to integrate OC and AI capabilities with the 3P solutions.

Agents can use Omnichannel Add-on in Embedded mode (3P CRM is the main UX, and OC/AI capabilities are Embedded) or Standalone mode (Dynamics OC/AI capabilities as the main UX, with 3P CRM data/connectivity available).



Example of Embedded Mode
(Available for Preview)



Example of Standalone Mode
(Available for Preview)

Scenario and Feature Availability

The table below summarizes scenario support:

Scenario	Availability
Integrate with Salesforce using an embedded UX	Private Preview, OOB support from MSFT
Integrate with any CRM using an embedded UX	Private Preview, Needs additional configurations
Integrate with Salesforce using a Standalone UX	Private preview
Integrate with any CRM using a Standalone UX	July 2024 (preview)

The table below summarizes feature availability:

Feature Area	Feature	Availability
Channels	Live Chat	Private Preview
	Voice	Private Preview
	Facebook Messenger	Private Preview
	WhatsApp (3P)	Private Preview, in Standalone Roadmap, in Embed
Copilot (AI)	Q&A	Private Preview
	Conversation Summary	Private Preview
	Knowledge Integration – Salesforce (OOB)	Private Preview
	Knowledge Integration – Other CRMs	Roadmap
	Case Summary	Roadmap
	Email Assist	Private Preview, in Standalone Roadmap, in Embed
Core Features	Presence	Private Preview
	Notifications	Private Preview
Core Functionality	Multiple Sessions	Private Preview
	Device Configuration (via conversation control)	Private Preview
	Non-device Configurations	Roadmap

Getting Started with the Preview

Requirements

You will need the following to get started:

Required:

1. A Dynamics Omnichannel Trial or Production account with valid license and credentials

Optional:

2. A CRM system (Salesforce preferred for Preview) that supports REST APIs and OAuth 2.0 authentication. [Optional, for Embedded Mode only]
3. A GitHub account. [Optional, for custom + non-Salesforce client-side CRM integrations]

Overall Process

The following steps will guide you to get the Omnichannel Add-on embedded mode working within Salesforce. **You should budget for 40 minutes or more to complete the Required Steps.**

Required Steps:

1. Setup Dynamics OC
2. Setup Copilot
3. Setup Salesforce (for Embedded Model; optional for Standalone)
4. Integrate Dynamics Omnichannel Add-on with Salesforce (for Embedded Model; optional for Standalone)

Optional Steps:

5. Make updates to your CRM integrations.
6. Sync (one-time or as needed) CRM data with Dataverse.

Required Steps

1. Setup Dynamics OC

Estimated Time: 10 minutes (especially if you need to set up a trial)

- i. You will need a working D365 OC org in NAM for the preview, and you can choose to:
 - a. Use your existing Dynamics OC NAM environment, **or**
 - b. Set up a new [Dynamics OC trial instance](#).
 - *The Dynamics OC trial comes with Voice and Live Chat enabled. If you need instructions on how to set it up, please refer to instructions for [voice](#) and [live chat](#) channels.*
 - Note: For the preview, you will need to get Dynamics Omnichannel with Dynamics Customer Service Enterprise. For GA, you will be able to get Omnichannel by itself.

Standalone Mode specific steps:

Estimated Time: 5 minutes

- ii. Prerequisites:
 - a. Ensure that channels are provisioned
 - b. Ensure that InboxSolution and InboxForOC solution versions end with 3.1 or higher
 - Example: 1.0.24043.2000
- iii. Import the Standalone Preview Solution in this [Github](#) packages folder called "msdyn_CCaaSClient_managed.cab"
- iv. Steps:
 - a. Import the msdyn_CCaaSClient_managed.cab solution into your org
 - Ensure that import completes successfully
 - b. Refresh your org
 - You may have to hard refresh (or empty cache and refresh) to see changes reflected
 - c. After refresh, you should see that the homepage of Customer Service Workspace is the Inbox
 - This means that CCaaS Standalone is successfully enabled

If you just wanted to enable Standalone mode, Congratulations - You should be all set! Please continue [here](#) for testing + feedback.

If you would like to set up Embedded mode, please continue below.

Embedded Mode specific steps:

Estimated Time: 5 minutes

- iii. Construct your Omnichannel embedded **widget URL** using the template:

a. Using the following template:

[https://ccaas-embed-prod.azureedge.net/widget/index.html?dynamicsUrl=https://\[ORG URL\]&tenantId=\[TENANTID\]&msdynembedmode=3](https://ccaas-embed-prod.azureedge.net/widget/index.html?dynamicsUrl=https://[ORG URL]&tenantId=[TENANTID]&msdynembedmode=3)

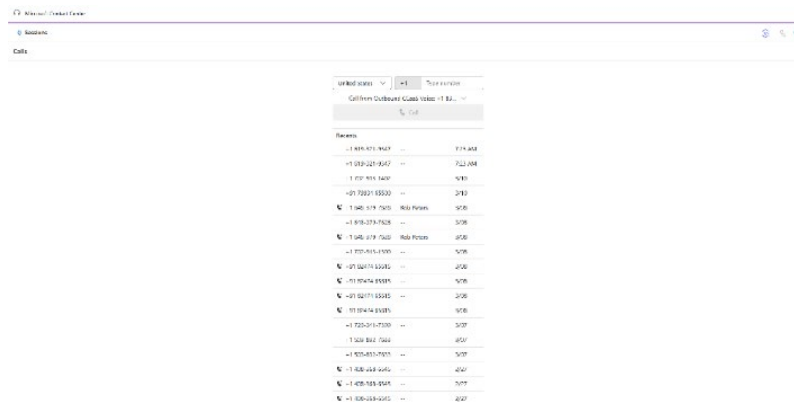
b. Replace your Org ID and Tenant ID in the template above.

i. Example of Tenant ID: 8cd46c97-38dd-4560-9228-3df8a717a198

ii. Example of ORG ID: msdynccaas.crm.dynamics.com

iv. Copy your new widget URL into a browser to test that Dynamics Omnichannel Add-on for 3P CRMs is working for your environment / org:

d. If you see a screen like the one below, congratulations – you can use Omnichannel Add-on in preview!



e. Facing issues?

- Ensure 3P Cookies are enabled.
- Ensure you have replaced your Org ID and Tenant ID in the template above.
- Any others: please use [this link](#) to let us know.

2. Setup Copilot

To enable Copilot, the three below-listed solutions in this [Github](#) packages folder need to be imported to the associated Microsoft Dynamics environment.

Below is the order in which the solutions should be installed:

1. msdyn_CSIntelligenceConfiguration_managed.cab
2. msdyn_CSIntelligenceCore_managed.cab
3. msdyn_CSIntelligence_managed.cab

During import, under Solution Action, choose Update (defaults to Upgrade) Previous customizations on components included in this solution, choose Overwrite customizations (defaults to Maintain customizations)

Then, enable Copilot from Customer Service admin center with Dynamics org (Customer Service admin center => Productivity => Copilot for questions and emails)

- Enable “Ask a question”
- Enable “Suggest a response”
- Enable “Help pane – Write an email”

Customer Service admin center

Save Save and close Refresh

✓

The knowledge base is ready and 0 articles are being used. Agents will now get AI-powered responses with Copilot.

Productivity

> Copilot for questions and emails

Copilot for questions and emails

Let agents get AI-powered help with answering questions and drafting emails. Select knowledge sources used for Copilot responses. Learn more. [Learn more](#)

ⓘ

This feature is currently supported in a limited number of languages. See the [full list of supported languages](#). Copilot responses in unsupported languages have not been tested for language accuracy. Make sure AI-generated content is accurate and appropriate before using it. [Read terms](#).

Select features

By using Copilot features powered by Azure OpenAI, you agree that data may be stored and/or processed outside of your geographic region, compliance boundary, or national cloud instance. [Learn more](#)

☒

Ask a question

Let agents chat with AI. This feature will always use knowledge sources.

☒

Suggest a response (preview):

Get a suggested response during a customer chat. [See preview terms](#)

☒

Help pane - Write an email:

Get help drafting an email in the help pane. [Manage data](#)

Contextual email drafting:

Get help drafting an email, inside the email compose window.

To turn this feature on or off, you need to [go to Power Apps](#). If this feature is on in Power Apps, the settings you choose on this page, like knowledge and others, will apply to it as well.

Setup your knowledge in Salesforce

- Log in to your Salesforce account.
- Select **Service Console** from the left-hand menu.
- In the **Service Console**, select the gear icon in the upper right and choose **Service Setup**
- Select **Knowledge Setup**.
- Go through the guide and add yourself as a knowledge author.
- Create a Data Category Group of “Medical” and a Data Category of “Procedure”.
- Select **Let’s Go** next to Create some Articles or navigate back to the **Service Console** view and select Knowledge from the drop down to the left.
- Select the **New** button.
- In the **Title**, enter **How to take an injectable shot**.
- Under **Question** add “How to safely take an injection.”
- For **Answer** enter the following text:

Pull the cap straight off one you are ready to inject. (**Important:** *Do not leave the white off for more than 5 minutes. This can dry out the medicine.*)

- Do not twist, bend, or wiggle the white cap.

Microsoft Confidential, Shared under NDA

- Do not put the white cap back onto the autoinjector.
 - Do not remove the white cap from the autoinjector until you are ready to inject.
- Create a firm surface at the selected injection site (thigh, stomach, or outer areas of the upper arm).
- With the cap off, put the safety guard on your skin at 90 degrees. The needle is inside the green safety guard.
- Firmly push down the autoinjector onto the skin until it stops moving. When you are ready to inject, press the start button. You will hear a click.
- Keep pushing the autoinjector down on your skin.
 - Your injection could take about 15 seconds to complete.
 - The Window will turn from clear to yellow when the injection is done.
- Make sure that you dispose of the use injector immediately in an approved sharps container.

- Select the **Save** button to save the knowledge article.
- On the **Knowledge**, select the **Publish** button.
- Ensure it is set to **Publish** now and select the **Publish** button.

3. CRM Setup (Salesforce)

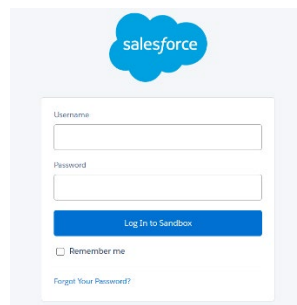
Estimated Time: 10 minutes.

- You can choose to use your existing Salesforce environment or set up a new trial / sandbox.
- Your Salesforce environment should have access to **Salesforce Service Console**
- If you need a Salesforce trial, you can get one [here](#).
- We prefer that you use a Salesforce Sandbox / Dev org as you can use it for over 30 days.

4. Integrating Dynamics Omnichannel Add-on with Salesforce

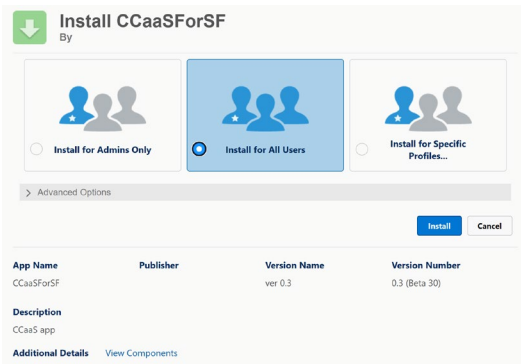
Estimated Time: 20 minutes.

i. Login to Salesforce



- a.
- ii. Download the Salesforce installation package using the following URL template.
 - a. URL template: <https://<sfdc-org-url>/packaging/installPackage.apexp?p0=04t8b000001BV5mAAG>
 - b. Note: Replace your sfdc-org-url with your Salesforce Org URL
 - i. Example of <sfdc-org-url>: flow-power-1788--dev3.sandbox.lightning.force.com

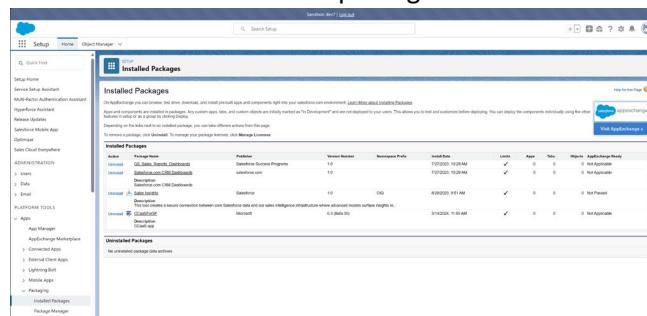
- iii. Select 'Install for All Users' and Click 'Install'



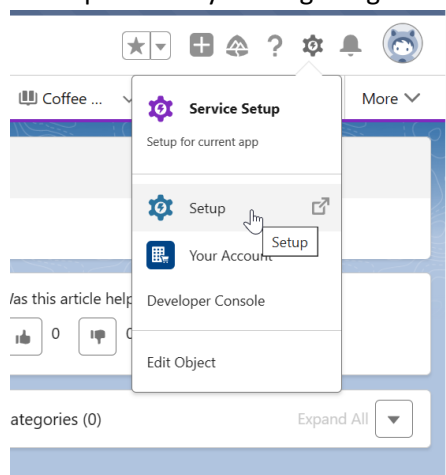
- iv. Once installation is completed, you should see a screen like the one below. Click on 'Done' to continue.



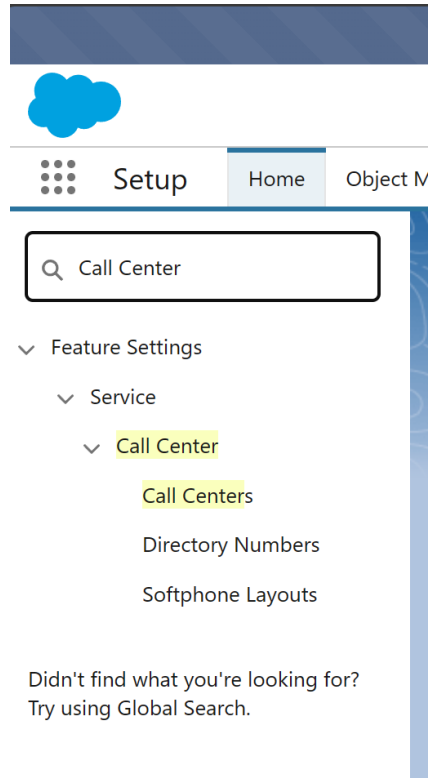
- v. If your package was installed correctly, you should see a screen like the one below, with 'CCaaSforSF' as one of the installed packages.



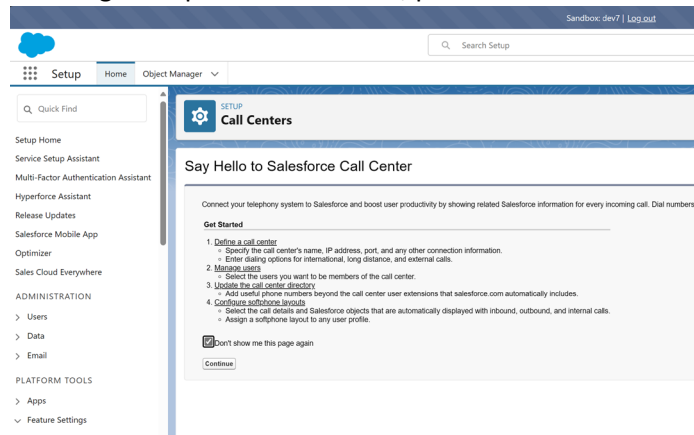
- vi. Go to the setup screen by clicking the gear icon on the top right corner:



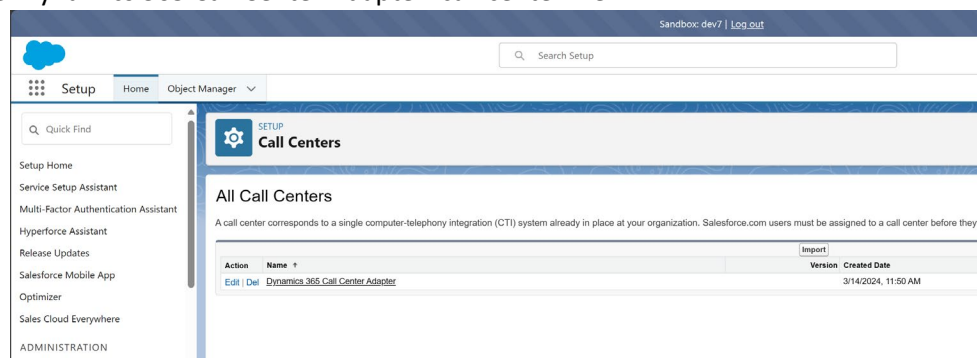
- vii. In the quick find menu, search for 'Call Center.'



- viii. a. If you are setting this up for the first time, press Continue.



- ix. a. Edit the 'Dynamics 365 Call Center Adapter' call center file:



- x. a. Update the CTI Adapter URL and Save (***This widget URL is the same one you would have used for testing Dynamics Call Center earlier in step 1. (ii)***)

Call Center Edit
Dynamics 365 Call Center Adapter

All Call Centers > Dynamics 365 Call Center Adapter

Call Center Edit

Save Cancel

General Information

InternalName DynamicsCCaaS

Display Name Dynamics 365 Call Center /

CTI Adapter URL https://ccaas-embed-prod.a

Use CTI API true

Softphone Height 600

Softphone Width 450

Salesforce Compatibility Mode Classic_and_Lightning

Save Cancel

- a.
- xi. Next, click on Manage Call Center Users > Add more users.
- xii. Select the user record that you have logged in with and click save.

Call Center
Dynamics 365 Call Center Adapter: Search for New Users

All Call Centers > Dynamics 365 Call Center Adapter > Manage Users > Search for New Users

Set the search criteria below and then click Search to find salesforce.com users who should be enabled as call center agents. Users already enabled as call center agents are excluded from the search results.

Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple terms in the field column, separated by commas.
- For date fields, enter the date in following format: 3/14/2024.
- For datetime fields, enter the value in following format: 3/14/2024, 12:11 PM

Find

Add to Call Center Cancel

<input type="checkbox"/>	Full Name	Alias	Username	Role	Profile
<input checked="" type="checkbox"/>	Adarsh_AJai	adarsh	adarsh@microsoft.com.deu?		System Administrator
<input type="checkbox"/>	Chackrachulam_Mithun	mthun	mthun@microsoft.com.deu?		System Administrator
<input type="checkbox"/>	Dina_Tina	T200n	tinadina@softphone.com.deu?		System Administrator
<input type="checkbox"/>	Information_Institute	info@iia	info@iia@softphone.com.deu?		Sales Invoicing Information User
<input type="checkbox"/>	Pradeep_Rao	pradeep	pradeep@softphone.com.deu?		Role User
<input type="checkbox"/>	Walter_Alex	walter	walter@microsoft.com.deu?		System Administrator

- a.
- xiii. Create a softphone layout
- a. In the quick find menu, search for 'Softphone Layouts'

Setup Home Object Manager

Search Setup

Activate Digital Trust Cards

Einstein Prediction Builder

Get Started with Einstein Bots

Most Recently Used

Name	Type	Details
Setup Call	Call	
SPC_Developer	Developer	

- b.
- c. Create a new or edit existing softphone layout

Setup Home Object Manager

Search Setup

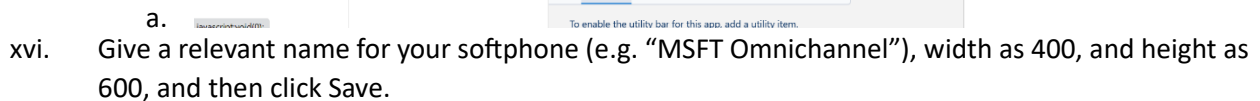
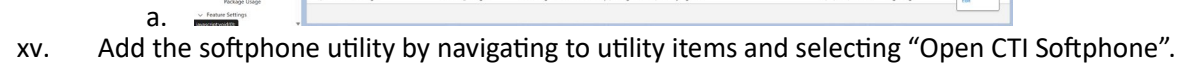
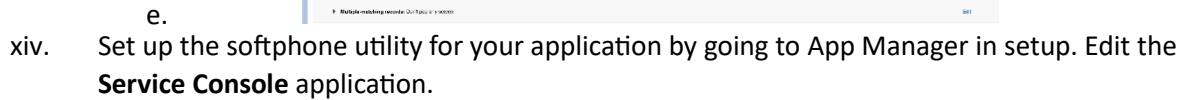
Setup Softphone Layouts

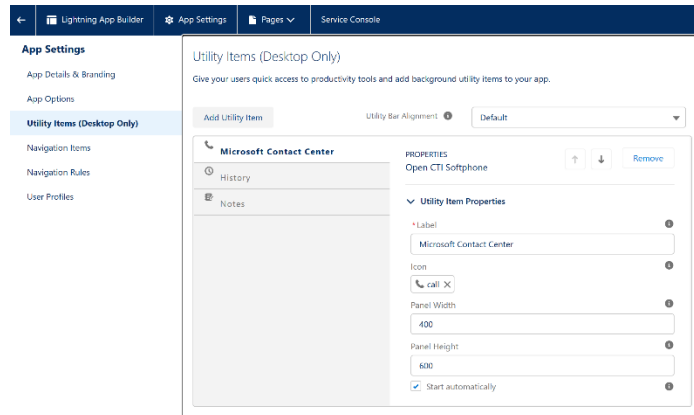
Softphone Layouts

A softphone is a customizable call control tool that appears in the sidebar of every salesforce.com page if a user is assigned to a call center and is working on a machine on which a CTI adapter has been installed. Similar to page layouts, you can design custom softphone layouts and assign them to call center users based on their user profile.

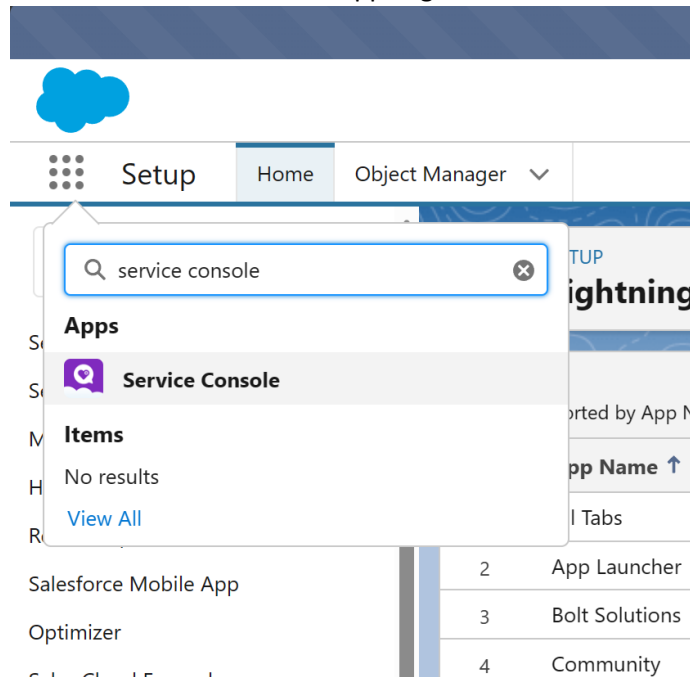
Action	Name	Default	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
Edit	Standard Softphone Layout	✓	augur	9/21/2023, 11:25 AM	augur	5/9/2024, 11:28 AM

- d. Check to ensure 'Is Default Layout' and then click 'Save'.

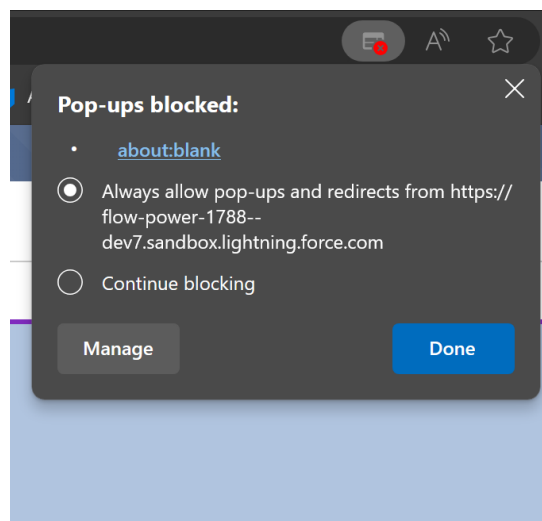




- a.
- xvii. Go to the Service Console from the App Page.

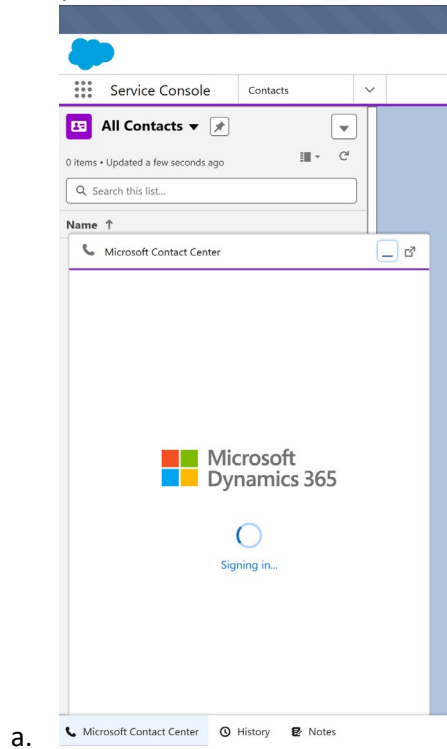


- a.
- xviii. Enable Popups.



a.

- xix. Refresh your browser. The Omnichannel Add-on should start to appear in your application!



CONGRATULATIONS – you've successfully setup your Omnichannel add-on with Salesforce

Test these scenarios + Feedback:

1. Make a test call to an agent
2. Start a live chat and help the agent
3. Change your presence
4. Use copilot for answering a question

Feedback: Please fill out a survey here. (<https://aka.ms/ccaas-survey>)

Appendix / Optional Steps:

4. Make updates to your CRM integrations

You can use events and data integration mechanisms provided with our Embedded widget to improve your integrations with Salesforce.

Events

Salesforce

As openCTI lib can be used for interacting with salesforce via CTIDriver feature discussed in the next section.

List of Events:

[Methods for Lightning Experience](#) | [Open CTI Developer Guide](#) | [Salesforce Developers](#)

ServiceNow

openFrame lib can be used for interacting with ServiceNow via CTIDriver feature discussed in the next section.

List of Events

[openFrameAPI](#) | [ServiceNow Developers](#)

Data Integration

Data integration with third party CRM is done by using the customer email address, phone number and name.

By using this information customer record can be found/saved in CRM and task can be created or case can be created for that contact/account.

GitHub repository for CTIDriver interface:

[copilot-for-service](#)

CTIDriver Customization

Note: These steps can be omitted if the default CTIDriver file is used.

1. Develop your CTIDriver file by implementing the ICTIDriver interface, which is available in the repository [microsoft/copilot-for-service \(github.com\)](#)
2. Make the class created in step 6 accessible within the window.CCaaS object. The class name created in step 6 is SFCTIDriver.

```
window.CCaaS = window.CCaaS || {};  
if (!window.CCaaS.CTIDriver) {
```

```
window.CCaaS.CTIDriver = SFCTIDriver;  
}
```

3. Add implementations for the methods provided by ICTI Interface.
4. Host the compiled file on a CDN and include the CDN URL as a query parameter in the call center definition file imported/seen in step 3 under "Salesforce specific instructions: CTI Adapter instructions" heading.
5. Note: It does not need to be a CDN URL, any URL with public access will also work

The format of the URL should be:

`https://ccaas-embed-test.azureedge.net/widget/index.html?dynamicsUrl=https://msdynccaasdev.crm.dynamics.com
&ctiDriverUrl=<CDN-url>`

Replace `<CDN-url>` with the actual URL of the hosted compiled file on the CDN.

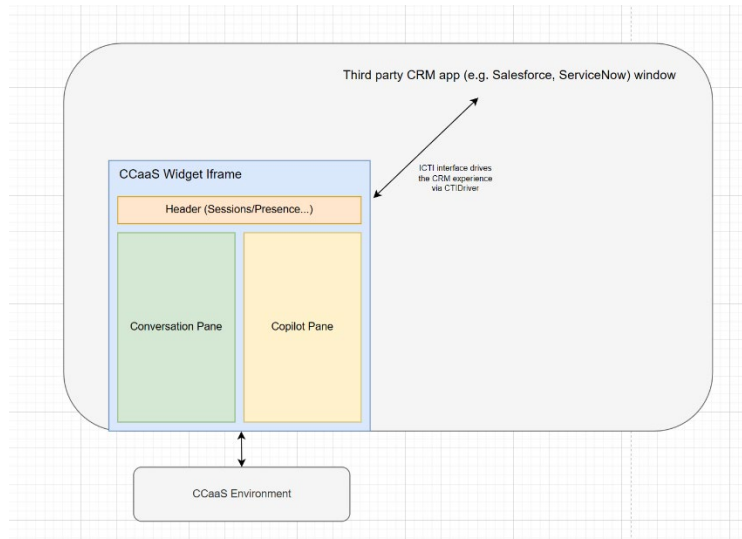
The screenshot shows the 'Call Center Edit' interface for the 'Dynamics Call Center Adapter'. The breadcrumb trail is 'All Call Centers » Dynamics Call Center Adapter'. The form has a 'Save' button and a 'Cancel' button. The 'General Information' section contains the following fields:

Field	Value
InternalName	DynamicsCCaaS
Display Name	Dynamics Call Center Adap
CTI Adapter URL	https://ccaas-embed-test.az
Use CTI API	true
Softphone Height	600
Softphone Width	450
Salesforce Compatibility Mode	Classic_and_Lightning

5. Sync CRM data with Dataverse

Microsoft is working on providing OOB connectivity to sync your CRM records with Dataverse. For now, we suggest using Power Automate if you need to sync your data. Please refer to [Connectors for Salesforce](#) for more details.

Reference Architecture



- **Third party CRM app:** The third-party CRM application serves as the host for the CCaaS widget. It embeds the CCaaS widget within its browser window, allowing seamless integration.
- **CCaaS Widget Iframe:** The CCaaS widget resides within an Iframe, acting as a container for all channel interactions and Copilot experiences.
- **Header:** The header component displays essential information, including sessions, user presence status, notifications, and other relevant details.
- **Conversation Pane:** The conversation pane serves as the central area for channel interactions. It accommodates chat, voice calls, and other communication channels.
- **Copilot:** Copilot experience to answer questions and suggest responses.

Support

If you have any questions or issues with the Embedded Widget, please write to us [here](#).

FAQs

Q. Would it be possible to have server-side integrations?

Ans. This functionality is included as a part of the roadmap.

Q. Copilot does not provide a relevant response, why?

Ans. For this preview, Copilot provides the best response if knowledge articles are available in Salesforce. Please add knowledge articles to Salesforce to help Copilot provide better responses.