

Dynamics 365 Contact Center SDK

Private preview guide

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Note: Everything is under NDA, unless otherwise stated. This is invitation only.

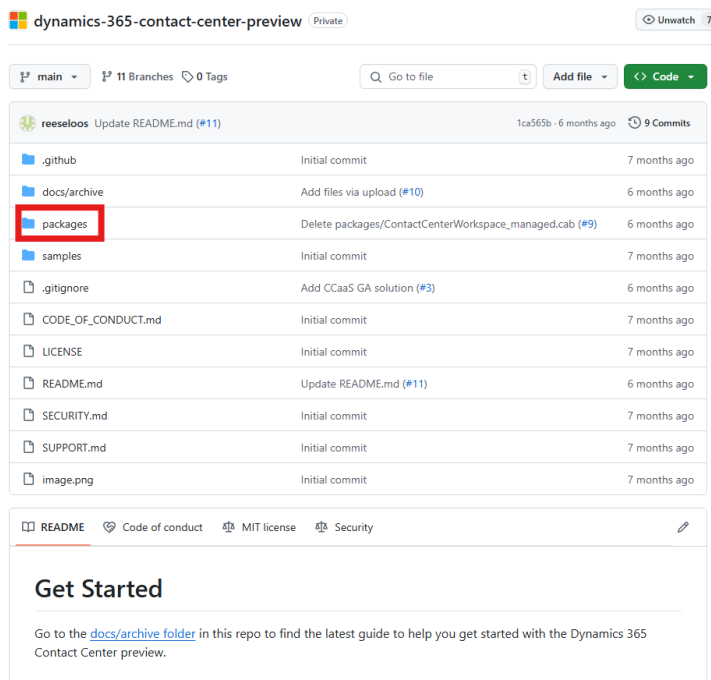
Overview

Objective: empower customers to use CCaaS SDK under Contact Center Workspace/Customer Service Workspace to leverage CCaaS SDK to fit their business needs.

Environment setup

There are two solutions that are required to be installed.

Please visit <https://github.com/microsoft/dynamics-365-contact-center-preview> and navigate to packages folder:



Please find the below two solutions in the CCaaS SDK preview folder:

| Name |
|---|
| .. |
| msdyn_ContactCenterClientAppConfiguration_managed.cab |
| msdyn_ContactCenterClientSolution_managed.cab |

Please follow the [official Dynamics 365 instructions](#) on how to install solutions. Please use Update when importing the solution:

Advanced settings ^

Solution action [Learn more](#)

☐ Upgrade

Upgrades your solution to the latest version. Any objects not present in the newest solution will be deleted.

☐ Stage for upgrade

Upgrades your solution to the higher version, but defers the deletion of the previous version and any related patches until you apply an upgrade later.

☒ Update

Replaces your older solution with this one.

☒ Enable Plugin steps and flows included in the solution

[Import](#) [Cancel](#)

1. Install msdyn_ContactCenterClientSolution_managed.cab first. Note, this must be done **in order.**
2. Install msdyn_ContactCenterClientAppConfiguration_managed.cab

App profile configuration

CCaaS SDK will be loaded based on your app profile configuration under Contact center workspace (CCW) or Customer service workspace (CSW).

For more information about Agent experience profile, please visit

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/create-agent-experience-profile>

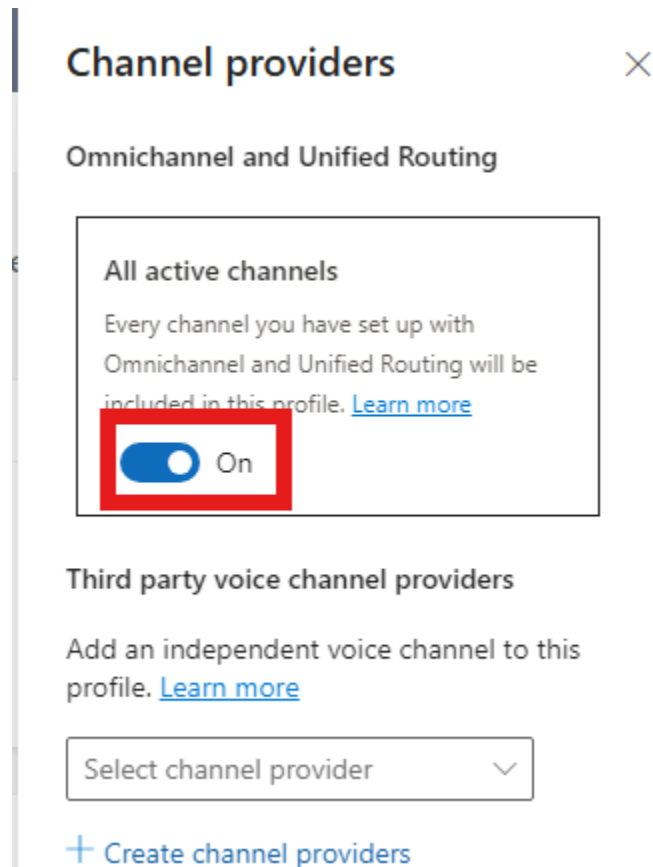
Custom agent experience profiles

If you have configured your custom agent experience profile, you must toggle the channel provider off and on again.

Locate the Channel provider card under Customer Service Admin Center (CSAC)

| Channel providers | | Edit |
|-------------------------------------|-----|----------------------|
| All active channels | On | |
| Third party voice channel providers | --- | |

Click Edit.



Toggle it off, click Save and close.

Toggle it back on, click Save and close again.

Consumption of CCaaS SDK

After all the setup has been completed, CCaaS SDK will be available in CCW or CSW.

You can access CCaaS SDK via **Microsoft.CCaaS.StandaloneSDK**

You can verify SDK availability via browser console, see below:

```
> Microsoft.CCaaS.StandaloneSDK
< ▶ Fu {presenceModule: bu, conver
```

Standalone API availability

Please check the API reference for Standalone SDK. **Currently we only support APIs marked for Standalone SDK only.**

Both **Embed SDK** and **Standalone SDK** share some core modules, while others are exclusive to the Embed SDK. Here's the breakdown:

Common Modules (Available in Both SDKs)

1. [ConversationModule](#)

Provides APIs and events related to conversations between the agent and the customer.

2. [PresenceModule](#)

Offers APIs and events related to agent presence within the CCaaS environment.

3. [VoiceOrVideoCallingModule](#)

Enables voice and video calling capabilities within the embedded application.

Embed SDK Exclusive Modules

1. [CTIDriverModule](#)

Contains the logic to interact with the third-party CRM and the Widget.

2. [DataverseModule](#)

Integrates with Dataverse to fetch records.

3. [NotificationModule](#)

Provides APIs and events for handling notifications within the CCaaS environment.

APIs marked with Standalone

Conversation Module

| Method | Availability |
|--|--------------------------|
| getAssignedConversationsList | Embed |
| getConversationDataUsingFetchXML | Embed |
| getFocusedConversationId | Embed |
| getConversationData | Embed |
| getTranscript | Embed, <u>Standalone</u> |
| onAccept | Embed |
| onConsultEnd | Embed, <u>Standalone</u> |
| onConsultStart | Embed, <u>Standalone</u> |
| onConversationLoaded | Embed, <u>Standalone</u> |
| onCustomerSentimentChange | Embed, <u>Standalone</u> |
| onNewMessage | Embed, <u>Standalone</u> |
| onNotesAdded | Embed |
| onReject | Embed |
| onStateChange | Embed |
| onTransfer | Embed |

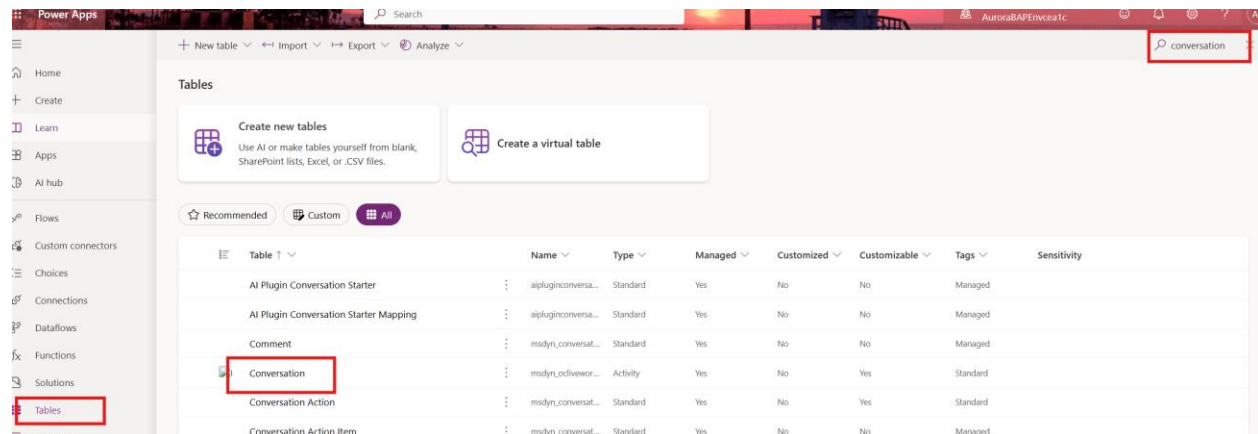
Using CCaaS SDK in the Active Conversation form onload script

Please use [CCaaSClientSDKExternal.d.ts](#) for strong typing.

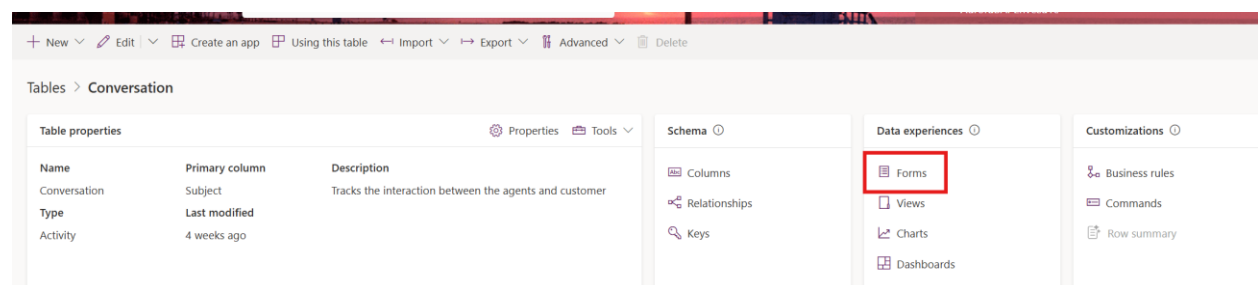
Example onload script is available under [samples/StandaloneSDKExample](#)

To register an onload script on Active conversation form, go to maker's portal:

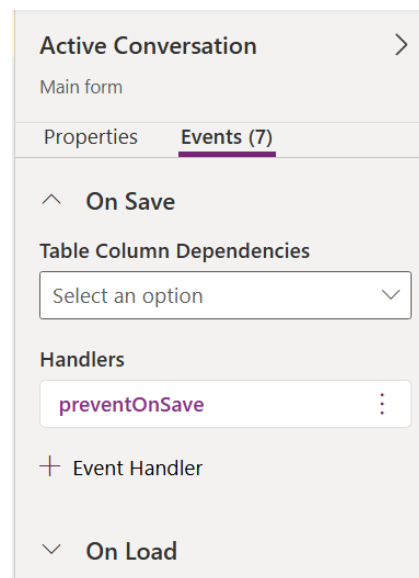
Navigate to Tables, and search for conversation in the top right corner:



Click on forms



Under events



For more information, please read the official PowerApps documentation on form onload scripts. <https://learn.microsoft.com/en-us/power-apps/developer/model-driven-apps/clientapi/events-forms-grids?tabs=add-event-handlers-legacy>