CX Connect with Dynamics Service Description
v.1.1

Contents

1. Overview

CX Connect with Dynamics is Kerv's integration between Genesys Cloud CX and Microsoft Dynamics. It provides a plug-in to Microsoft Dynamics that enables agents to use Genesys from within the Dynamics web user interface so that contact centre agents have easy access to all the tools necessary to handle all their interactions in one place – the Microsoft Dynamics application.

2. Capabilities

CX Connect with Dynamics is distributes as a Managed Application for easy incorporation into Dynamics. It embeds the Genesys user interface inside Dynamics so that agents can manage their availability status, accept, or decline calls, handle emails, and all other channels within Genesys and using the tools that Dynamics provides.

It provides the following features:

- Embedded Genesys UI within Dynamics
- Screen-pop
- Create interaction record
- Click-to-dial
- Multi-tasking
- Simple and easy to install and configure
- Single Sign on Between Dynamics and Genesys

2.1. Deployment

Being a managed app, CX Connect with Dynamics is very easy to install and deploy.

You will need to configure:

- Your Genesys region and organization
- The desired size and layout of the Genesys user interface inside Dynamics
- The search process for identifying customers based on telephone number, email address, etc.
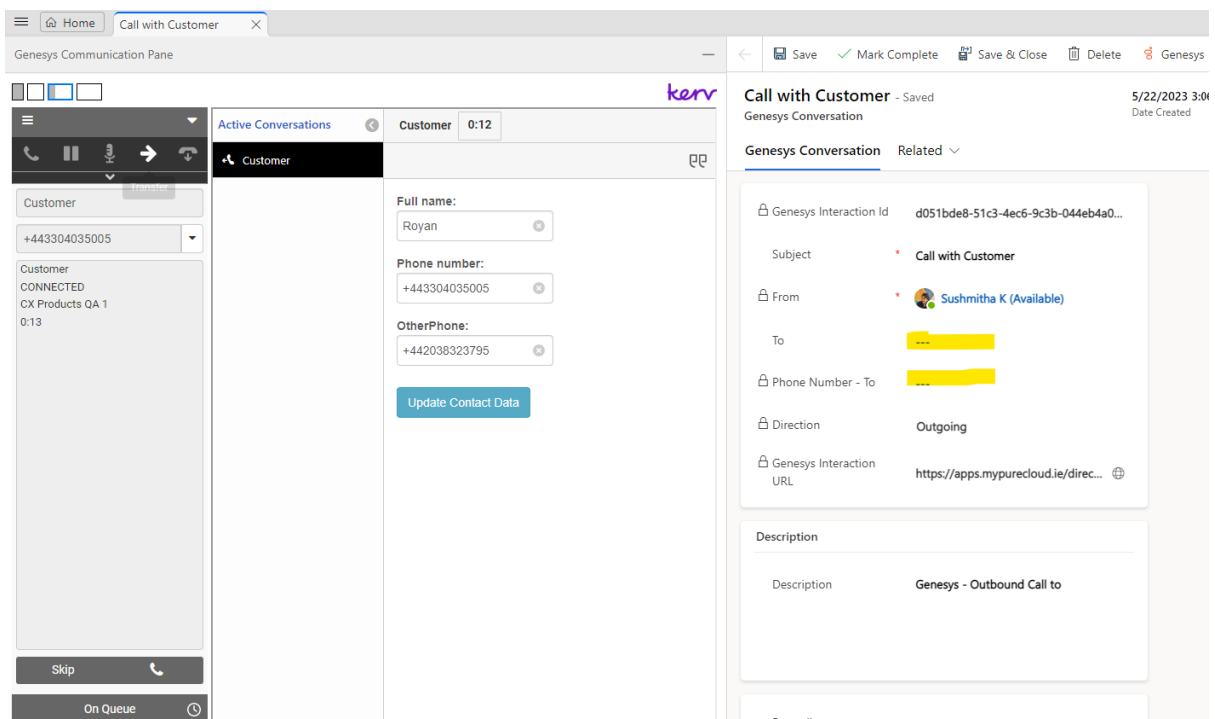- The entity you wish to screen-pop

2.1.1. Customer pre-requisites

The following prerequisites are needed:

- Microsoft Dynamics M365
- Customer Service Enterprise License per user that needs to use the Genesys Connector
- Channel Integration Framework v2
- Genesys Cloud Organization

2.2. Features

2.2.1. Embedded Genesys UI within Dynamics

Embedding the Genesys user interface directly inside the Dynamics Web Application helps agents be productive. There's no more alt-tabbing between different applications, and no

chance of missing an important notification, such as a telephone call ringing but not being answered.

2.2.2.   Screen-pop

All media types can be screen-popped:

- Incoming calls
- Oncoming emails
- Incoming web messaging interactions (includes web-chat, whatsapp, facebook messenger, SMS etc.)
- Callbacks (includes outbound dialling)

Different customers use Dynamics in different ways depending on their business model. For example, B2C organisations will generally equate an Account with an individual in Dynamics, but B2B customers may equate them with companies, we have provided the flexibility to configure which entity you wish to screen-pop. You can configure the system to screen-pop Accounts or Contacts or both. You can customise the search function to allow other entities to be popped.

2.2.3.   Create interaction record

When a record is screen-popped, the system automatically creates a task record associated with the current interaction. This record contains the Genesys Conversation id, and can be used later to obtain information such as the agent who processed the interaction, the date and time of the interaction, and contains a reference to it, which agents can subsequently use to obtain a voice recording or transcription.

This enables agents to easily see what previous conversations have taken place with the customer they're dealing with.

2.2.4.   Click-to-dial

Anywhere you have a telephone number in Dynamics, you can press a button to make a telephone call to that number. This will automatically create an interaction within Genesys, so that the agent's state is managed properly, and a record of the conversation is kept.

2.2.5.   Multi-Tasking

Genesys allows agents to work on multiple interactions at the same time. This is usually configured for emails and Web Messenger sessions (for example, Web Chats).

CX Connect for Dynamics allows this to be extended to Microsoft Dynamics, so that each tab corresponds to a different interaction, so that agents can always see work within the context of each interaction.

Swapping tabs within Dynamics changes which interaction is active, so that an agent can swap between different web-chat sessions in order to answer different questions from multiple customers.

2.2.6. Simple and easy to install and configure

Because CX Connect for Dynamics is a Managed Application within Dynamics, it is very easy to set up. The configuration is stored within Microsoft Dynamics and no external web server is required.

2.2.7. Single Sign on Between Dynamics and Genesys

CX Connect for Dynamics is expected to work within a single-sign on environment. Users who has signed in to Dynamics will automatically be logged in to Genesys when they start up.

2.2.8. Channels Supported

The following channels are supported:

Inbound voice	✓
Email	✓
Web Messaging (includes chat, WhatsApp, Facebook Messenger etc.)	✓
Callback	✓
Outbound calling	✓
Web-chat	✗

3. Billing

Customers are billed based in the number of users in their Genesys organisation that have the Embeddable Framework permission. Customers are billed monthly in arrears.