



Consilium UniAgent™ MSD Connector User Guide v10.1

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1 Introduction:

This document provides a detailed description of Consilium UniAgent™ Webex Calling with Microsoft Dynamics 365 CRM. This document also provides the detailed feature set of Consilium UniAgent™ and user screens with description and its working which helps user to work with UniAgent™ and use its features.

1.1 About UniAgent™:

- Consilium UniAgent™ is a web-based graphical user interface.
- It enables integration between CRM and Cisco Telephony.
- UniAgent™ can be deployed on Windows server and configured on IIS.
- Agent needs to login into UniAgent™ using her/his Webex Agent Desktop credentials.
- Agent can answer calls and perform other activities using UniAgent™.
- Caller information is populated within UniAgent™ with From Address, To Address, DNIS and Dialed number.

1.2 UniAgent™ Detailed Feature Set:

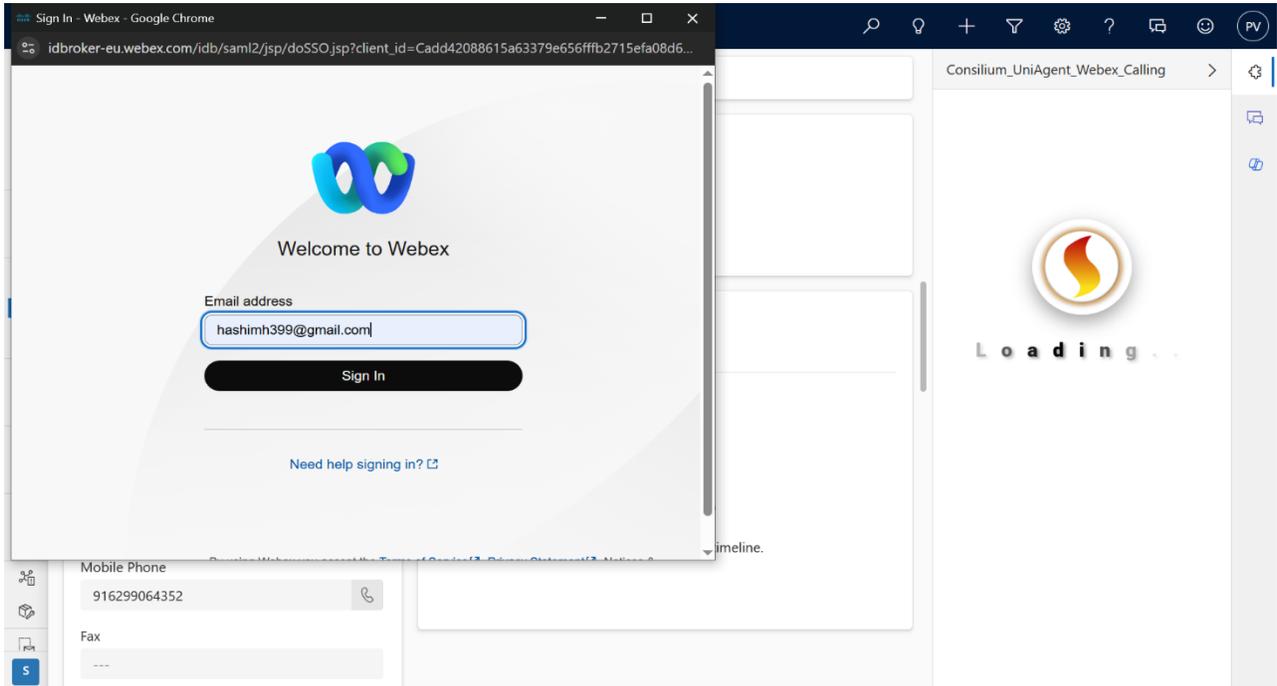
- Screen pop in MSD CRM based on ANI /CED.
- Notes capability in UniAgent™ UI
- End-of-Call update activity.
- Embedded call controls: Answer, Hold, Resume, Consult, and SST (Single Step Transfer).

2 Audience:

This document targets to the people who is going to use UniAgent™ MSD CRM Connector. It is also assumed that the reader is already familiar with Cisco Webex call controls, MSD CRM, and Cisco terminologies. Users should be familiar with Cisco Webex Agent Desktop as well.

3 Login into UniAgent™:

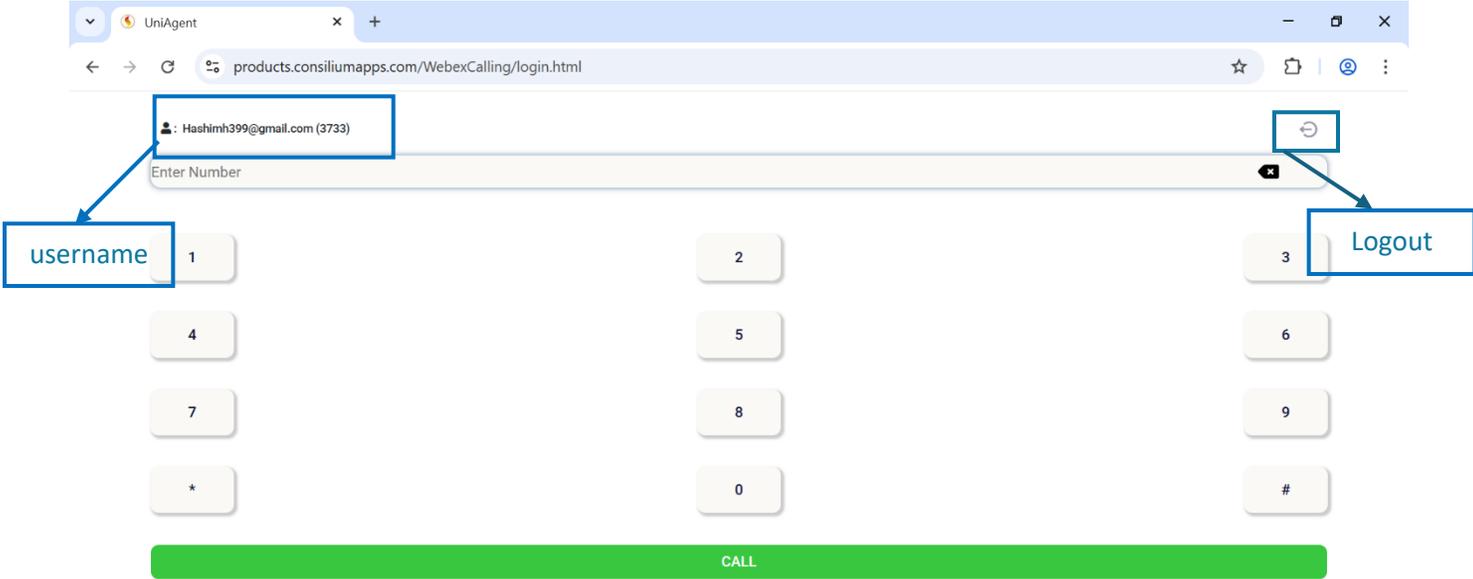
To log in to UniAgent, click the **Login** button. This will open the **Sign in to Webex** modal. Enter your admin credentials (e.g., Gmail and password associated with your Webex account). After successful authentication via Webex, you will be automatically redirected to the UniAgent softphone interface.



UniAgent™ Login Screen

3.1 UniAgent™ Softphone Description:

After successful login Softphone with different features will be displayed as shown below.



3.2 UniAgent™ Title bar:

The Title bar displays the Agent Name and Extension Number and Logout button.

3.3 Keypad:

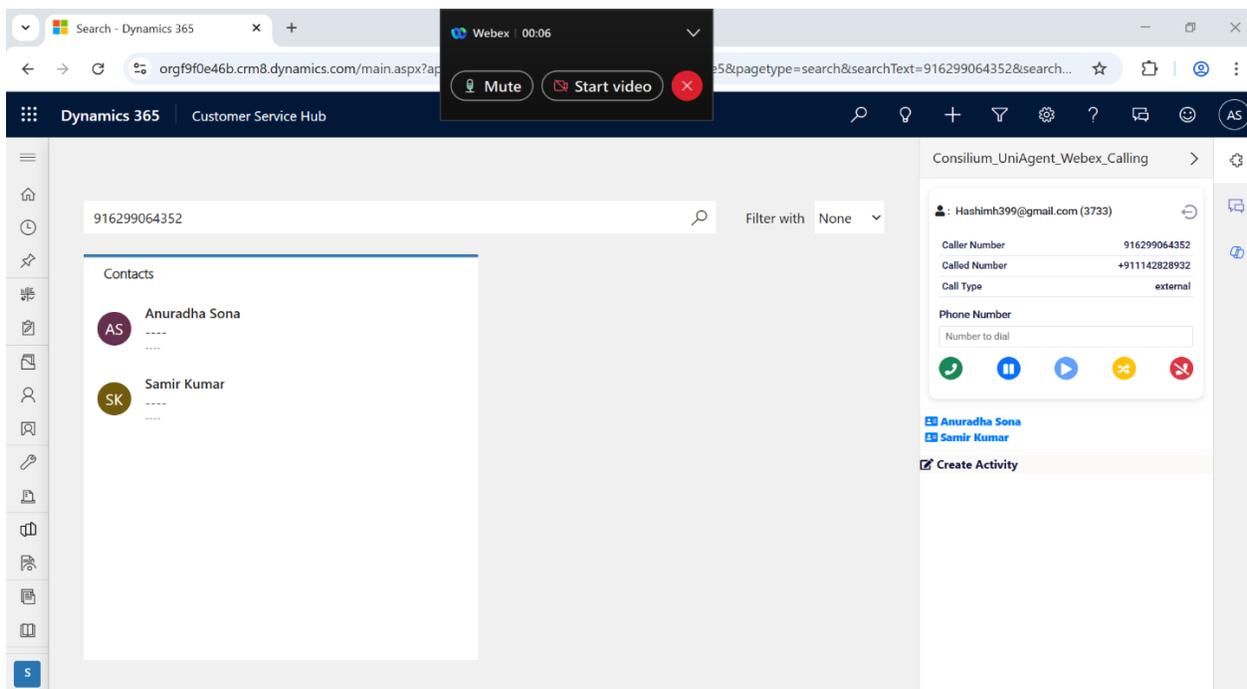
Along with the call button soft keypad (dial Pad) is displayed to dial the contact number.

4 Call Connecting options:

UniAgent™ simplifies Agent Capability to handle call and take appropriate action.

4.1 Incoming Call:

When an incoming call is connecting, UniAgent™. In this Agent can see the caller Number, called number, call type and CTI Search Result (No Matching or Single Matching or Multiple Matching) of customer records. The Agent can receive the call by clicking on Answer button.



Call Connecting options

When the call is connected the following Call control buttons are displayed as shown in Talking screen.

- **Hold button**  - To Hold the ongoing Call.
- **Resume button**  - To resume the Hold Call.

- **Transfer SST** (Single Step Transfer)  -The Agent can transfer the call to another Agent without any consultation.
- **End button**  - The Agent can end the ongoing call by clicking on end button.

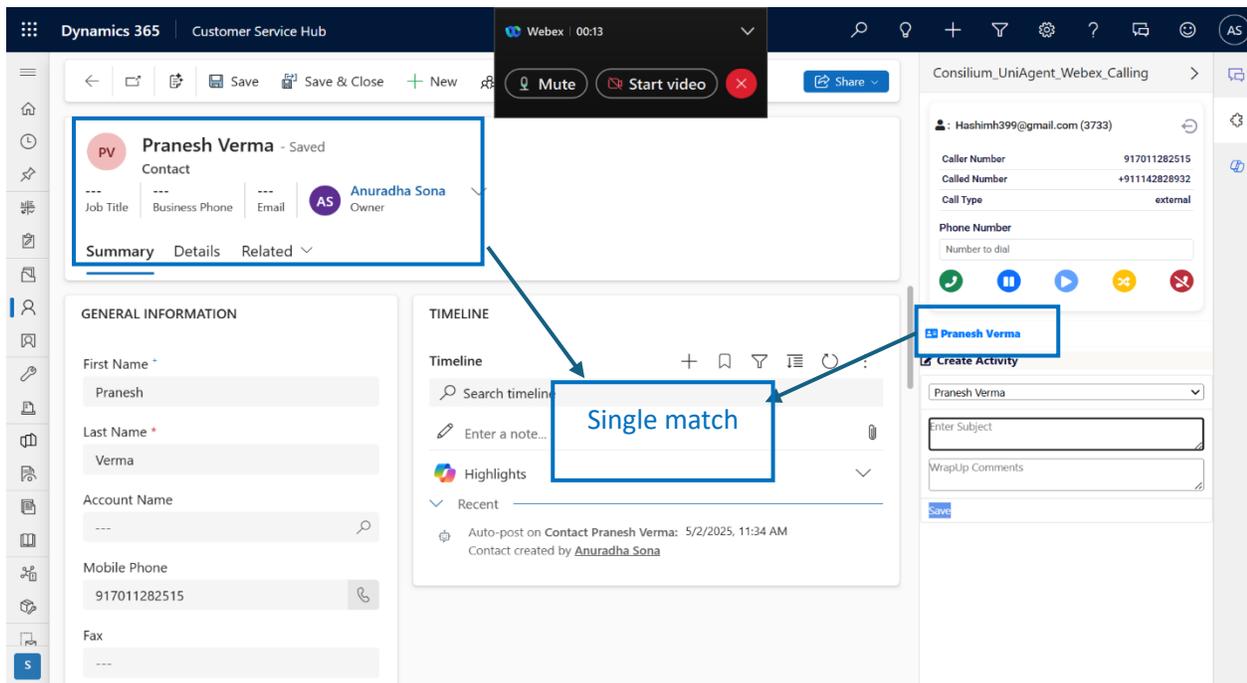
4.2 CTI Search Result:

UniAgent™ will make a search query into MSD CRM based on input received. Screens will be popped up based on matching records in MSD CRM. Below search results can be possible.

- **Single Matching:** - If the number already has a single record available in CRM(Contact), then Search Result display Matching.
- **Multiple Matching:** - If the same number has registered more than one record, then Search Result display Multiple Matching.
- **No Matching:** - If a new contact number is not available in CRM, then Search result displays No-Matching Record and it would open the new CRM Contact Page.

4.3 Single Match Scenario:

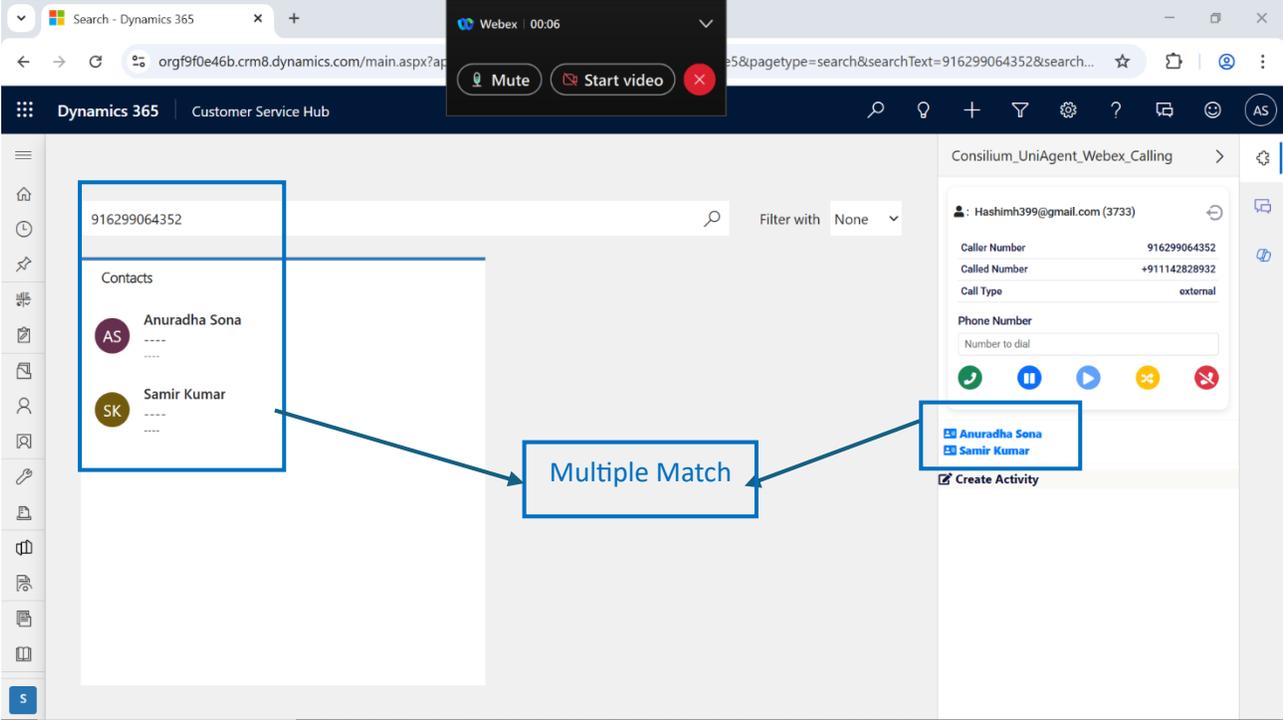
When an agent receives a call, UniAgent™ hit a search query into CRM and populate matching contact info CRM page on separate browser tab, basis of ANI and if one matching contact is found, there would one CRM tab would be opened with matching contact information. Matching contact name is displayed in UniAgent™ as well. Below is the screen shot of Single match in UniAgent™.



Single Match Scenario

4.4 Multiple match Scenario:

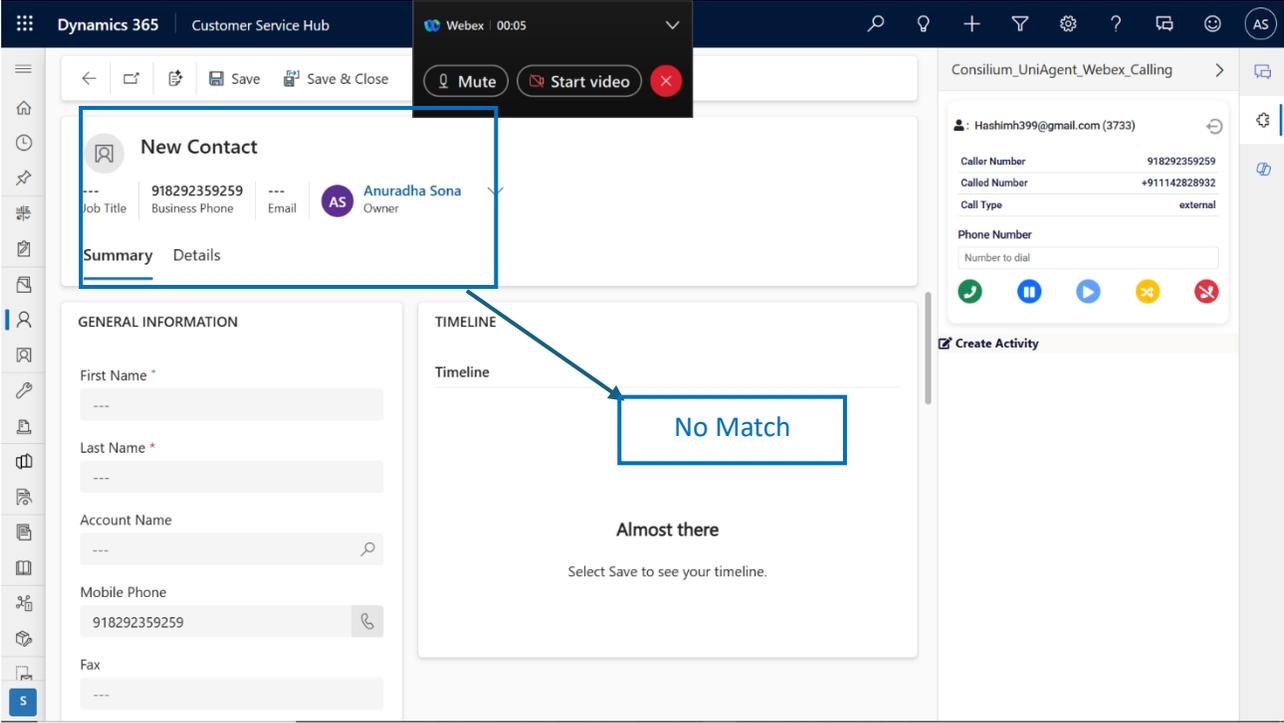
When an agent receives a call, UniAgent™ hit a search query into MSD CRM on the basis of ANI and if multiple contacts found, UniAgent display the multiple matching contacts into UniAgent™, and same contacts are populated in new browser tabs. Agent can click on relevant contact and work on same accordingly.



Multiple Match Scenario

4.5 No Match Scenario:

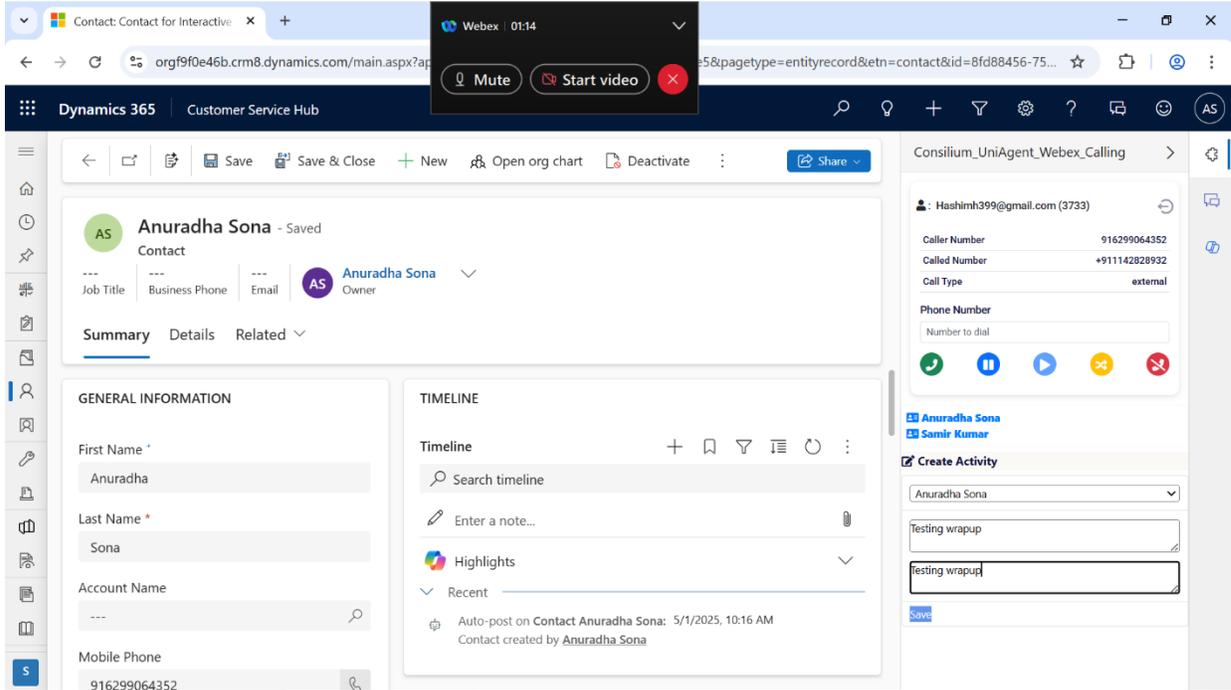
When an agent receives a call, UniAgent™ search for matching contacts and if no record found, UniAgent™ would populate a New Contact CRM page in new browser tab. Agent can fill relevant information and save for future references.



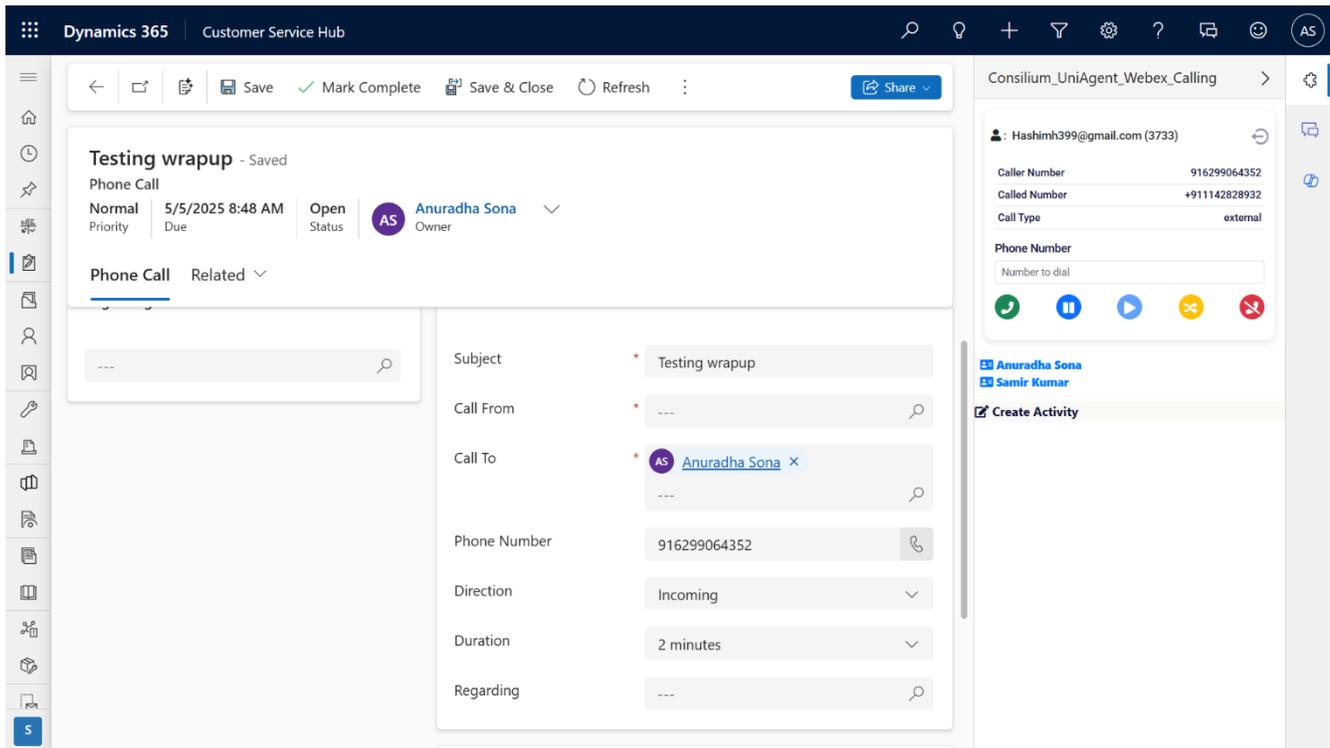
No Match Scenario

5 Activity

The agent can create an activity while the call is ongoing. A dropdown list displays the matching records, from which the agent can select the appropriate one. The agent can then add a subject and comments, and save the activity to Microsoft Dynamics 365 CRM. Once the activity is saved, the created activity page will automatically open.



Save Activity



Activity created

6 Click-To-Dial

The Click-to-Dial feature allows users to initiate outbound calls directly from Microsoft Dynamics 365 by simply clicking the phone icon next to a contact’s or lead’s phone number. This function is integrated with Webex Calling, enabling seamless and efficient communication without manual dialing

7 Phones supported

- Webex App

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