

# **Cirrus Call Manager**

## **E-learning Reference Companion**

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## 1 Welcome

Welcome to this companion guide for Cirrus Call Manager. Within this guide, you'll be shown how to use Cirrus Call Manager App in D365 instance.

This guide is intended to supplement the e-learning provided with Cirrus Call Manager. While it can be used alone, you may find the simulations contained within the e-learning a useful resource.

## 2 Inbound call

#### 2.1. Launching D365 phone call activity

#### 2.1.1. Single Matching case

When a user receives a call from individuals; and there is a single matching record in Dynamics 365, a browser window will launch and ask for D365 login and redirect to respective lead / contact / account's phone call form with incoming direction. There will also be the ability to log the details of the call simply by typing a description of the call.

If the user has provision to download cirrus call record, the recorded file will attach in notes for future reference

iall Received From Ben Males 🛛 🖂 🗡									
🖬 Save 🧹 Mark Complete 📲 Save & Close 🕐 Refresh 🔍 Check Access 🗙 Close Phone Call 🗄 Process 🗸 🗊 Delete 📷 Email a Link 🔍 Assi	sign 🗈 Add to Queue 📱 Convert To \vee 🗄								
Call Received From Ben Males Phone Call -> Phone Call ->	Normal Open Priority Due Status Owner	~							
Phone Call Related									
Subject Call Received From Ben Males	CUSTOMER DETAILS	-							
Call From * [2] Ben Males	A Ben								
Call To * A Technical Team	A Males								
Phone Number 07432094931 & Direction Incoming	A Company D Pumbha								
	A Email								
Reparding 17 Ban Malar	A Mobile 07432094931								
Desting	🛆 Business 0333 103 8823 🕓								
	RECENT CASES								
	✓ Status ∨ Case Title ∨								
Description									

#### 2.1.2. Searching records for caller withholds their numbers case

If the caller withholds their number, you will be presented with a screen that informs you that they have done this, and we'll then help you to search for the caller's record:



So, you can now easily search for the caller's name (or the company they work for). Any matching records will be displayed as you type in the search box. Let's say that the caller's name is Andrew Dixon; by typing in Andrew in the search box his contact record is displayed:

#### 2.1.3. Searching records for no matching case

If there are no records that match the caller's number, you'll be presented with the same search box that we saw in below picture. It's possible that this is first time the individual has called. Or that they've changed their phone number so that their record now out of date.

(cirrus)	
There are no matching records for 0743209****. Please search for the caller below; if there are no records please create a new contact or lead	
Search	

If the user has provision to download cirrus call record, the recorded file will attach in notes for future reference.

Cirrus						
There are no matching records for 0743209****. Please search for the caller below; if there are no records please create a new contact or lead						
Search						
CONTACTS						
New Contact New Lead						

#### 2.1.4. Multiple record match case

If there is more than one record that matches the caller's number, the search window will again be displayed with a note informing you of this and displaying the matching records:

If the user has provision to download cirrus call record, the recorded file will attach in notes for future reference.

Cirrus						
There are 2 records matching 07432094931. Please choose a record below or search for another contact if the caller is not displayed. You can also create a new contact or lead if required.						
Search	<mark>م</mark>					
ACCOUNTS	CONTACTS Benjamin Males					
New Contact	New Lead					

You can choose which record to attach the phone call activity (in this example by clicking on the name of the account or contact – or the icon next to each name). You may also create a new contact or lead if this is a more appropriate option for you.

#### 2.1.5. Creating new contact

When a user receives a call from individuals; and there is a single matching record in Dynamics 365, a browser window will launch and ask for D365 login and redirect to respective lead / contact / account's phone call form with incoming direction. There will also be the ability to log the details of the call simply by typing a description of the call.

Contact					
Details	Contact Informat	ion		Address	
First Name *	 Email			Street 1	
Last Name *	 Mobile Phone			Street 2	
Job Title	 Business Phone	0333103000		City	
	Description			ZIP/Postal Code	
			h		
					Carrol Carrol

#### 2.1.6. Creating new lead

When a user receives a call from individuals; and there is a single matching record in Dynamics 365, a browser window will launch and ask for D365 login and redirect to respective lead / contact / account's phone call form with incoming direction. There will also be the ability to log the details of the call simply by typing a description of the call.

Lead		
Personal Information	Contact Details	Details
First Name *	Email	Topic "
Last Name *	Business Phone 0333103000	Budget Amount
Job Title	Mobile Phone	
Company Name	Description	
	11	

Save Cancel

## 3 Recorded call download

#### 3.1. Outbound and Inbound call record download

If your organisation uses the call recording features within Cirrus, then it is possible to automatically attach the call recordings to the Phone Call activity records. Call recordings will only be attached if:

- Call recordings are enabled on your Cirrus account
- For outbound calls, your Cirrus agent must be set to record calls
- For inbound calls, the service or queue that receives the call must be set to record calls
- The option to attach call recordings is enabled in your Dynamics 365 instance
- Your Dynamics 365 user account is enabled to download your recorded calls.

If the above settings are enabled, then call recordings will be added automatically to your phone call activity records. The quickest way to download the call recording is to ensure that the call has finished within Cirrus; and then marking the phone call activity as complete by clicking the Mark Complete button:

III Dynamics 365	Sales Hub	SANDBOX	P C Q + 7 @ 7 R (					
=	← ① Nument Q Check Access 😚 Process >> 🖹 Delana ID Email a Law	🗅 Add to Queue 🛱 Queue Item Details 🐮 Share 🔊 How 🗸 🖷 Word Templates 🗸 🗐 Run Report 🗸						
⊛ Home →	a. 🗎 Read-only This record's status Completed							
© Recent ∨ ⊀ Plened ∨	Call Received From Ben Males Phone Call - Phone Call		Normal Completed Technical Factors					
My Work	Phone Call Related							
# Dathboards								
2 Activities	Subject Call Received From Ben Males		CUSTOMER DETAILS					
Customers	Call From 1 Pl Ben Males		🙃 Ben					
Accounts	Call To A Technical Team		A Males					
A Contacts	Phone Number 07432094631	% Direction Incoming	A Company 🖪 Pumbha					
Sales			A final					
📽 Leads			A Mobile 07432094031					
Opportunities	Reparding 🕅 Ben Males		A Buckness 0333 103 8823					
尺 Competitors	Duction		Market Child					
Collatoral			al teaco					
B Quetes	Devotedae							
Crisins			P					
B Invoices			No data available.					
@ Products								
M Sales Disrature	Device	t	BIITLEMENT					
Marketing	Q Search timeline							
B Marketing Litts	4 1000		a D					
41 Campaigns	-		No data available.					
S1 Quick Campaig	Recorded Call Attached							
Performance	4 Cal, 115331718.mp3	\$2347	2011 I-50 PM V					
@ Goah								
E Forecasts	Outbound Call Log							
Service	Call Secret Los							
P Cases *	with the second procession of the second sec							
5 Sales C	and forestand 1							

#### 3.2. Call Record notification

#### 3.2.1. Non access for download call record

If the global option to download call recordings to Dynamics 365 is enabled, but an individual's Dynamics user account does not have the option to download call recordings set, then a confirmation warning message will be displayed on the Phone Call activity record:

Call Received From Benjamin Males											62 >		
U	Refresh	🔍 Check Acc	ess	🛛 Process 🗸	🗊 Delete	🖙 Email a Link	🚊 Add to Queue	🗟 Queue Item Deta	iils 📝 Share	≫ Flo	w ~ :		
$\square$	Read-only	This record's status	s: Com	pleted									
(!)	This call rec	ording will not be	down	Iloaded as your Dynami	cs account do	es not have the downloa	d Cirrus calls option set.						
Call Received From Benjamin Males     Normal      Completed     Ben Males       Phone Call     > Priority     Due     Status     Owner									~				
	Subjec	t	*	Call Received From	Benjamin M	ales			CUSTOMER	DETAILS			
	Call Fr	om	*	R Benjamin Males					🔒 Benjamin	I			
	Call To	)	*	A Ben Males					△ Males				
	Phone	Number		07432094931	S	Direction	Incoming		A Company				

#### 3.2.2. Portal Admin credential in invalid or missing

If the Cirrus Administration Portal user account credentials are changed and are not updated in the Cirrus Call Manager solution within Dynamics. then all call recordings will stop being downloaded into your Dynamics 365 instance

Please update the Cirrus Administration Portal user credentials to reinstate call recording downloads. If the details are updated in Dynamics on the same day that they were changed in the Cirrus Administration Portal, then any missing call recordings will be downloaded overnight without the need for further intervention.



#### 3.2.3. API response error other than credentials issue

If an unexpected error, or an error that is not listed above is encountered when an agent uses the Click to Call function, the following message will be displayed in the Phone Call activity record:

If you are a Dynamics 365 administrator, then you can investigate the exact error using the Outbound API Call Log that we have created in Dynamics 365 If you are unable to resolve the issue, then please contact support for further assistance.

	Dy	namics 365	5 Setti	ngs ~	Outbound C	all API L >	> Call To Ben Males >		
0	New Ale	rts (2) Latest: You'	ve got an alert fo	or the mailbox "	Technical Team'.	9/14/2021 9:47 AM	View Alerts		
+	NEW		DELETE	ន្ទឹង ASSIGN	🗘 SHARE	🖘 EMAIL A LIN	K 🔹 RUN WO	RKFLOW	► S
	cirr Cal	<mark>l To Ben M</mark>	ales =	DG : INFORM	MATION				
	⊿ Ge	eneral							
	Na	me *	Call To	Ben Males					
	Phone Call Call To Ben Male								
	Is Invoked 🔒 Yes								
	API	l Response Log		R: Authentica	ation not valio	ł			

## 4 Outbound Call

#### 4.1. Invoke an outbound call in D365

4.1.1. Account window to invoke outbound call from D365

	Dynamics 365	5   s	Sales Hub				SA	NDB	OX		
=			$\leftarrow$	Save	🛱 Save	e & Close	+ New	占 Open (	Org Chart	<u></u>	Deactiva
ഹ	Home	<b>^</b>	Sy:	fore							
	Recent	~	Acc	ount · A	Account $\vee$						
\$	Pinned	~	Outbound	Call S	ummary	Project	Price Lists	Details	Field Se	rvice	Sche
Му	Work										
	Dashboards		Main P	ione		98765437	654			S	
Ż	Activities										
Cus	tomers										
	Accounts										
2	Contacts										

#### 4.1.2. Contact window to invoke outbound call from D365

The Cirrus Call Manager for Dynamics 365 also makes it quick and easy to call people with a single click within Dynamics utilising our "Click to Call" function.

Cirrus' platform will immediately call your agent phone and when this call is answered it will dial the number adjacent to the blue button in Dynamics 365.

Dynamics will then display the Phone Call activity record so that you can log the call and note any details.

	Dynamics 365	Sales Hub SANDBOX
=		General Save & Close + New Deactivate R Connect   ~ The Add to Marketing List R, Assign TS     Add to Marketing List R, Assign
(A) (C)	Home Recent V	Benjamin Males Contact - Contact -
\$7	Pinned 🗸 🗸	Outbound Call Summary Details Scheduling Related
My	Work	
瘀	Dashboards	Business Phone 07432094931 % Cime Orthourd Cell
Ø	Activities	
Cus	tomers	
3	Accounts	
8	Contacts	

#### 4.1.3. Lead window to invoke outbound call from D365

The Cirrus Call Manager for Dynamics 365 also makes it quick and easy to call people with a single click within Dynamics utilising our "Click to Call" function.



#### 4.2. Outbound call Notifications

#### 4.2.1. Contact number is not defined

If a user attempts to use the Click to Call button for a record where no telephone number has been entered the following pop-up notification will be displayed:

Dynamics 365	Sales Hub SANDBOX
=	🗧 🖶 Save 🖉 Save & Close 🕂 New 🔥 Open Org Chart 🗋 Deactivate 🖄 Connect   🖂 🧮 Add to Marketing List 🔍 Assign 🕅
<ul> <li>G Home</li> <li>G Recent</li> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> </ul>	Jo's Emporium Account - Account - Outbound Call Summary Project Price Lists Details Field Service Scheduling Related
My Work 地 Dashboards 図 Activities	Main Phone example C
Customers	
Accounts R Contacts	× Dial Number is not defined
Sales	
Copportunities	ок
R Competitors	

#### 4.2.2. User agent credential is missing

If an agent attempts to use Click to Dial without first having entered their Cirrus Agent credentials in Dynamics 365 then the following error will be displayed on the Phone Call activity record:

≡	← 🔚 Save ✓ Mark Complete 👹 Save & Close 🛛 Flow ∨
යි Home	We could not place this call as your Cirrus user details are missing.
🕒 Recent 🗸 🗸	New Phone Call
🖈 Pinned 🗸 🗸	Phone Call $\cdot$ Phone Call $\vee$
My Work	Phone Call
<u>ल</u> ेन् Dashboards	Subject *
🖄 Activities	
Customers	Call From * <b>A Technical Team</b>
Accounts	Call To 🔹 🌜 Call To Ben Males
A Contacts	Phone Number 0333 103 8823 & Direction Outgoing
Sales	

#### 4.2.3. User agent credential is incorrect

If an agent changes their credentials but does not update their Cirrus Agent credentials in their user's settings in Dynamics 365, then the following error will be shown on the Phone Call activity record when they attempt to dial using Click to Call:

	Dynamics 365	Sales H	dı		S	AN	DBO>	<	
≡		÷	🔚 Save	✓ Mark Comple	te 🛱 Save 8	L Close	🖔 Refresh	🔍 Check Access	imes Close Phone
ណ	Home		We could not pla	ace this call as your Ci	rrus user details ar	e incorrect	t.		
Ŀ	Recent 🗸	Ca	all To Ben	Males					
\$	Pinned 🗸	Ph	one Call · Ph	one Call $\sim$					
Му	Work	Ph	one Call F	Related					
	Dashboards	1.5	Subject	* 0	ll To Pop Malos				
Ż	Activities		Subject		all to bert males				
Cus	tomers		Call From	* ۶	Technical Tear	n			
	Accounts		Call To	<b>1</b> *	Ben Males				
8	Contacts		Phone Nur	nber 0	333 103 8823	S	Direction	Outg	oing
Sale	25								

#### 4.2.4. API Response error other than credential issue.

If an unexpected error, or an error that is not listed above is encountered when an agent uses the Click to Call function, the following message will be displayed in the Phone Call activity record:

	Dy	namics 365	Settir	ngs ~	Outbound C	all API L >	Call To Ben N	lales >	
0	New Ale	erts (2) Latest: You'v	/e got an alert fo	or the mailbox	'Technical Team'.	9/14/2021 9:47 AM	View Alerts		
+	NEW	DEACTIVATE		ទ្វិ <sup>ន្ន</sup> ASSIGN	C SHARE	🖘 EMAIL A LINK	🔅 RUN WO	ORKFLOW	► S
	ciri Cal	rus outbound II To Ben M	ales •≡	DG : INFORI	MATION				
	⊿ G	eneral							
	Na	ime *	Call To	Ben Males					
	Ph	one Call	Call To	Ben Males					
	Is I	Invoked	Yes						
	AP	'l Response Log	ERROF	१: Authentic	ation not valio	ł			

## 5 Admin Settings

#### 5.1. Cirrus Portal Configurations

In Dynamics 365 navigate to Settings > Solutions > Cirrus Call Manager. In the Username and Password boxes, please enter credentials for a Cirrus Administration Portal user that has permissions to access call recordings for the service(s) that record calls, and for the customer account(s) where agents whose calls are recorded are provisioned.

Solution: Cirrus Call Manag	jer			
Solution Cirrus Call Manager				
2 Information	Cirrus Portal Login Crodo	ntials		
Configuration	Cirrus Portai Login Creder	ittals		
<ul> <li>Components</li> <li>Entitier</li> </ul>	User Name *			
Ontion Sets	Oser Manie			
Client Extensions				
Web Resources	Password *			
R Processes				
Plug-in Assemblies	Enable downloading of Cirrus call			
Sdk Message Processing S	recordings to Dynamics			
Service Endpoints				
Dashboards				
Reports				Save
Seconnection Roles				
Article Templates				
Contract Templates				
Email Templates				
🔛 Mail Merge Templates				
Security Roles				
84 Field Security Profiles				
Routing Rule Sets				

#### Portal admin credential notification

If the Cirrus Administration Portal user account credentials are changed and are not updated in the Cirrus Call Manager solution within Dynamics 365.

Image: The second s	B Stepert Solution Statistics • Ager Cirrus Portal Login Credee User Name •	cirrustestcrm.crm11.dynamics.com says: Cirrus portal user credentials are incorrect Initials	OK	€ Hep •
Y∰ Client Extensions	Password * Enable downloading of Cirrus call recordings to Dynamics	×		
Aeports     Connection Roles     Contract Templates     Contract Templates     Contract Templates     Mail Templates     Mail Templates     Mail Reprints     Security Roles				Save Reset
File Solution: Cirrus Call Manag	프   😱 Export Solution   隆 Translations +	cirrustestcrm.crm11.dynamics.com says: Cirrus portal login details have been updated.	ОК	€ Hep
iolution Cirrus Call Manager fromation Configuration	Cirrus Portal Login Crede	ntials		
Components  Compon	User Name * Password *	Narayana/Sysfore		
	Enable downloading of Cirrus call recordings to Dynamics	×		
Jusnboards     Asnboards     Reports     Connection Roles     Article Templates     Contract Templates     Email Templates				Save Reset

The following error will be displayed on the Phone Call activity record:

Please update the Cirrus Administration Portal user credentials to reinstate call recording downloads. If the details are updated in Dynamics on the same day that they were changed in the Cirrus Administration Portal, then any missing call recordings will be downloaded overnight without the need for further intervention.

Note that if call recordings cease to be downloaded to Dynamics 365 this **does not** affect call recordings in Cirrus in any way – the call recording will still be present in the Cirrus Administration Portal in the normal.

File Save and Close	🖺 🛛 🐺 Export Solution 🛛 💱 Translations 🕶	cirrustestcrm.crm11.dynamics.com says:		🕜 <u>H</u> elp 🤊
Solution: Cirrus Call Manage	2r	Downloading of Cirrus call recordings have been disabled for all users.		
2 Information	Cirrus Portal Login Creder	ntials		
Components Entities Option Sets	User Name *	Narayana/Sysfore		
Client Extensions  Web Resources	Password *			
<ul> <li>Processes</li> <li>Plug-in Assemblies</li> <li>Sdk Message Processing S</li> <li>Service Endpoints</li> </ul>	Enable downloading of Cirrus call recordings to Dynamics			
Connection Poler			Save	
Article Templates Contract Templates Email Templates Mail Merge Templates				

#### 5.2. Cirrus User Agent configurations

When a user receives a call from individuals; and there is a single matching record in Dynamics 365, a browser window will launch and ask for D365 login and redirect to respective lead / contact / account's phone call form with incoming direction. There will also be the ability to log the details of the call simply by typing a description of the call.



#### 5.2.1. User agent credential validation notification

If a user enters incorrect Cirrus Agent credentials in their Dynamics 365 user record, the following error will be displayed when they save their details:

The user should click the OK button and re-enter the correct details, remembering to click save to update their changes.



#### 5.3. Cirrus Call Record Log

#### 5.3.1. Call Record Log

Cirrus Call Manager for Dynamics 365 provides a log of API call attempts to retrieve call recordings. This log can be accessed in the same way as for the Outbound API Call Log (above) via Settings or the Phone Call activity record.

You can see from the log that several attempts are made to retrieve the call recordings if previous attempts fail:

🗰 Dynamics 365 Settings 🗸 😋	II Record API Logs > Call Received From B >
<b>New Alerts (2)</b> Latest: You've got an alert for the mailbox 'Tech	nical Team'. 9/14/2021 9:47 AM View Alerts
🕂 NEW 🗋 DEACTIVATE 🏛 DELETE 🚭 EMAIL A LIN	ik 👶 RUN WORKFLOW 🕞 START DIALOG 👦 🕫 FLOW 👻 📑 WORD TEMPLATES ୟ
CIRRUS CALL RECORD API LOG : INFORMATION	i
Call Received From Ben Males	* <b>=</b>
⊿ General	
Name*	Call Received From Ben Males
Phone call *	Call Received From Ben Males
Is Downloaded	🗎 Yes
API Response Logs	
Attempted Time   Action	Response Log
9/24/2021 3:42 PM Call Close/Complete	https://auto.call-view.com/datafiles/ut_recor
9/24/2021 3:50 PM 1st Attempt	https://auto.call-view.com/datafiles/ut_recor

#### 5.3.2. Call Record Response Log

Cirrus call manager for Dynamics 365 provides a log of API call attempt to retrieve call recordings. This log can be accessed in the same way for the Outbound API Call log via settings or phone call activity.

	Dynamics 365 Settings 🗸 ca	all Record API Logs > Call Received From B >	SAN	DBOX	م	<b>3</b> -
N	ew Alerts (2) Latest: You've got an alert for the mailbox 'Tech	hnical Team'. 9/14/2021 9:47 AM View Alerts				
+ 1	NEW 🗋 DEACTIVATE 🏛 DELETE 🖚 EMAIL A LIF	NK 👶 RUN WORKFLOW 🕞 START DIALOG 🛛 🕫 FLOW 👻	WORD TEMPLATES * 🗈 RUN REPORT *			
	cirrus call record api log : information Call Received From Ben Males	N "≡			Status* Active	
	4 General					
	Name*	Call Received From Ben Males				
	Phone call *	Call Received From Ben Males				
	Is Downloaded	A Yes				
	API Response Logs					
	Attempted Time 🛧 🛛 Action	Response Log				
	9/24/2021 3:58 PM 1st Attempt	https://auto.call-view.com/datafiles/ut_recor				

#### 5.4. Cirrus Outbound Response Log

The **Outbound API Call Log** provides logging whenever the Click to Call function is invoked. This log can be accessed in one of two ways:

To access the entire log, click on **Settings** and under the Extensions section click **on Outbound API Call Logs:** 

	Dynamics 365	Settings 🗸	Outbound Call API L	> Call To iuytrew >		SAN	NDBOX	م	3	+
1 Ne	w Alerts (2) Latest: You've g	got an alert for the mailbox	'Technical Team'. 9/14/2021 9:47 /	AM View Alerts						
+ N	ew 🗟 deactivate 🏻 🏾	🗑 DELETE  🎂 ASSIGN	🕄 SHARE 🛛 🕬 EMAIL A	LINK 💰 RUN WORKFLOW	▶ START DIALOG 0/ <sup>0</sup> F	LOW				
	сı <mark>rrus оитвои</mark> м Call To iuytre	ID CALL API LOG : INI ?W <sup>™</sup> ≣	FORMATION					Owner*	leam (	
	₄ General									
	Name *	Call To iuytrev	N							
	Phone Call	Call To iuytree	N							
	Is Invoked	🗎 Yes								
	API Response Log	OK: 11624947	77							

Alternatively, to see logs for an individual Phone Call activity record, navigate to the activity record that you want to investigate, then click the arrow in the navigation header and under the Common section click Outbound API Call Logs:

The API response (providing the specific error message) will be shown in the General section:

сі <mark>кки</mark> s оитвоим Call To Gabr	id Call Api log : Information iele Cannata 📹
▲ General	
*Name	Call To Gabriele Cannata
Phone Call	Call To Gabriele Cannata
Is Invoked	Yes
API Response Log	ERROR: call not allowed whilst operator is logged out