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
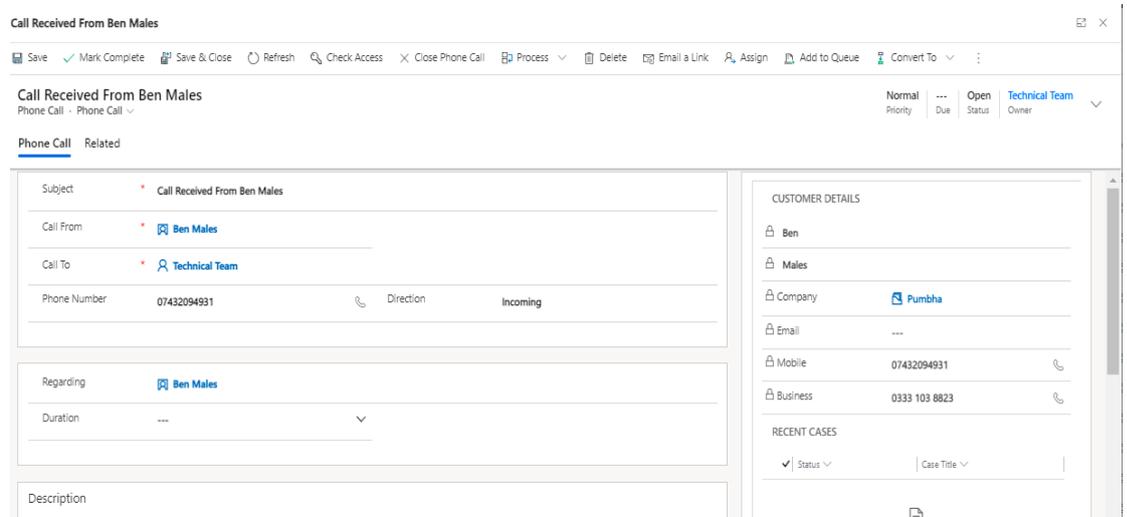
2.1.2. Searching records for caller withholds their numbers case

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 Or that they've changed their phone number so that their record now out of date.

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

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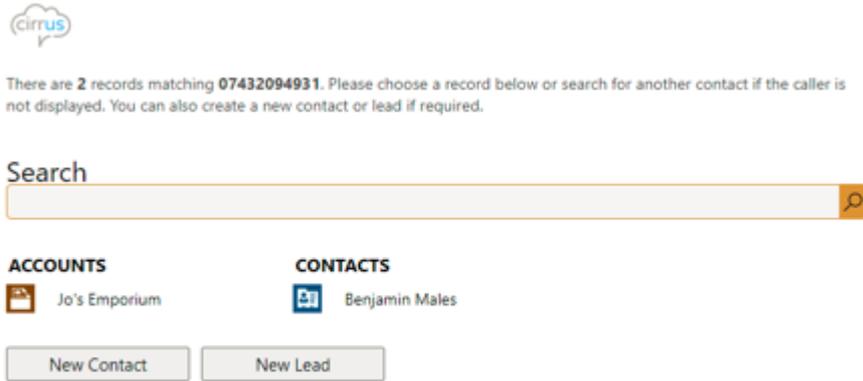
You can choose which record to attach the phone call activity (in this example by clicking on the name of the account or contact – or the icon next to each name). You may also create a new contact or lead if this is a more appropriate option for you.

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.

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	--		

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:
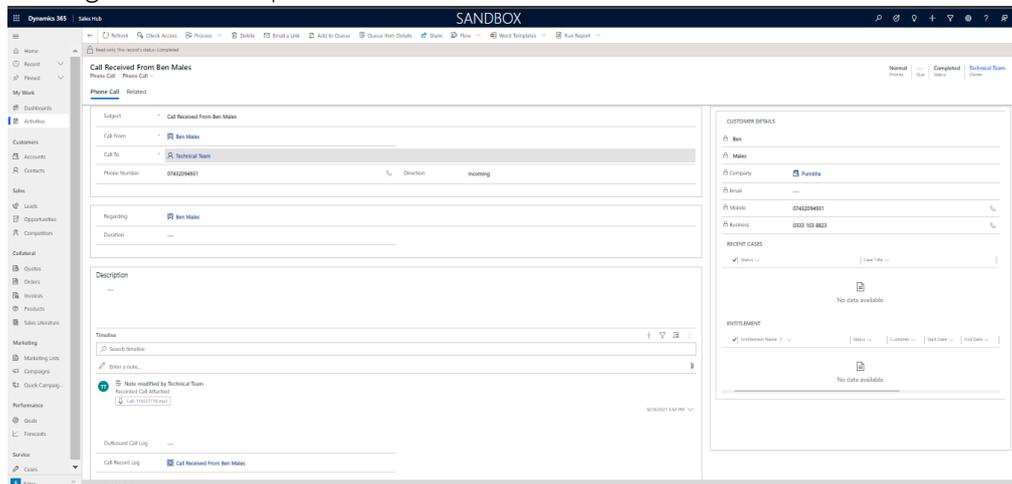
3.2. Call Record notification

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:

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.

4 Outbound Call

4.1. Invoke an outbound call in D365

4.1.1. Account window to invoke outbound call from D365
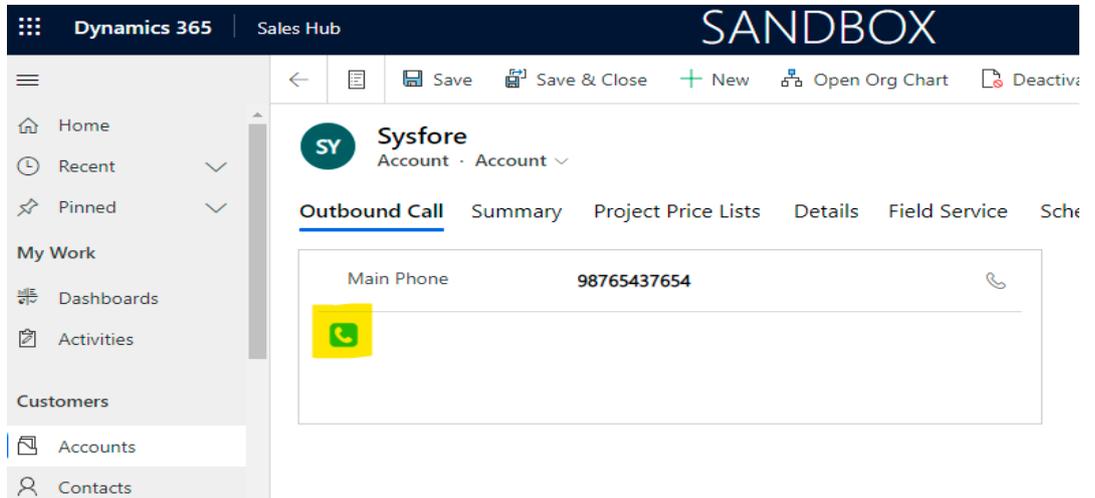
4.1.2. Contact window to invoke outbound call from D365

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.
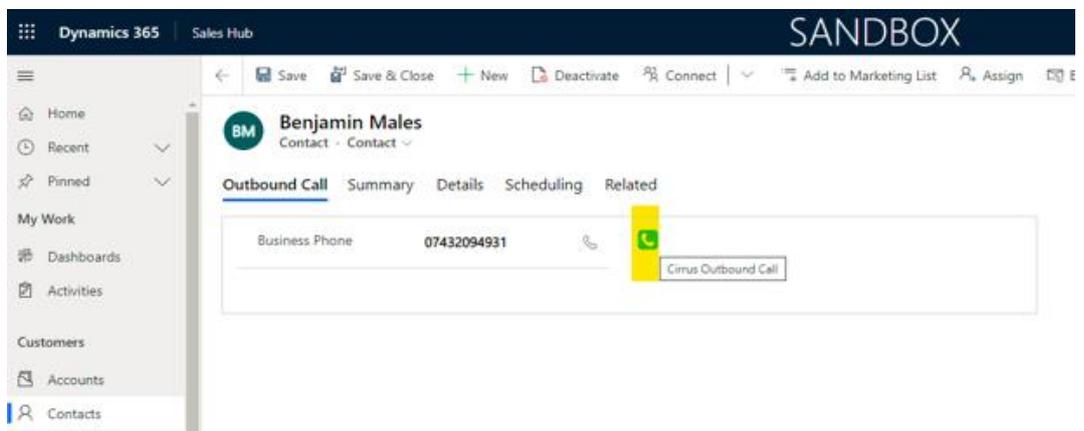
4.1.3. Lead window to invoke outbound call from D365

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.
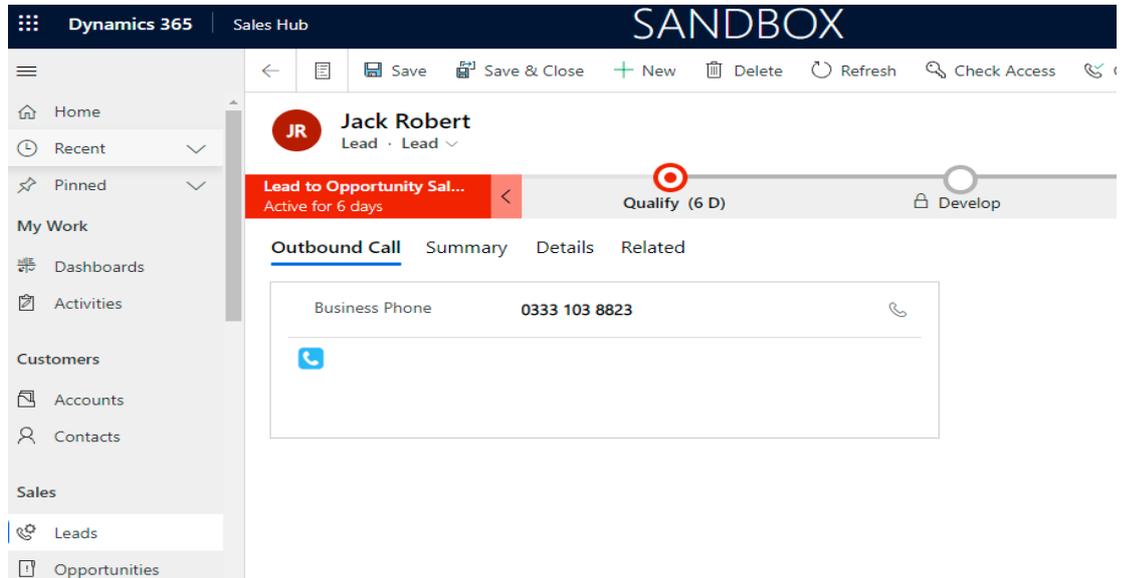
4.2.   Outbound call Notifications

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:
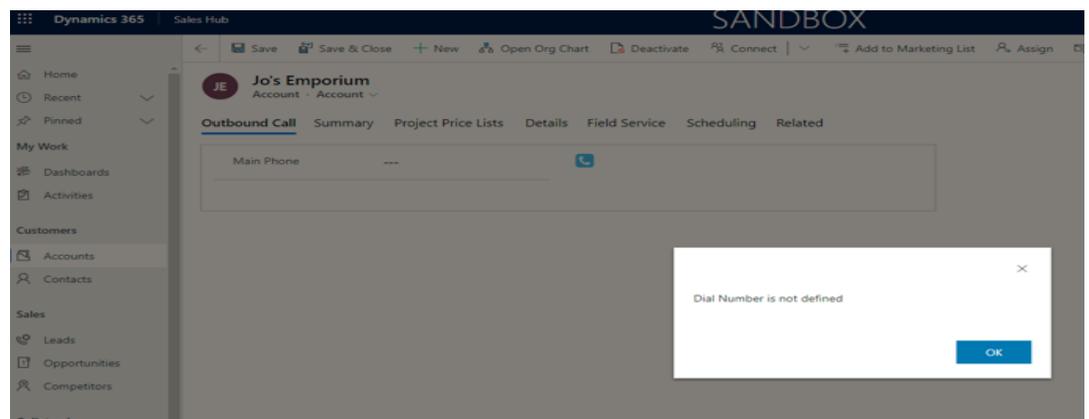
4.2.2. User agent credential is missing

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:

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:

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:
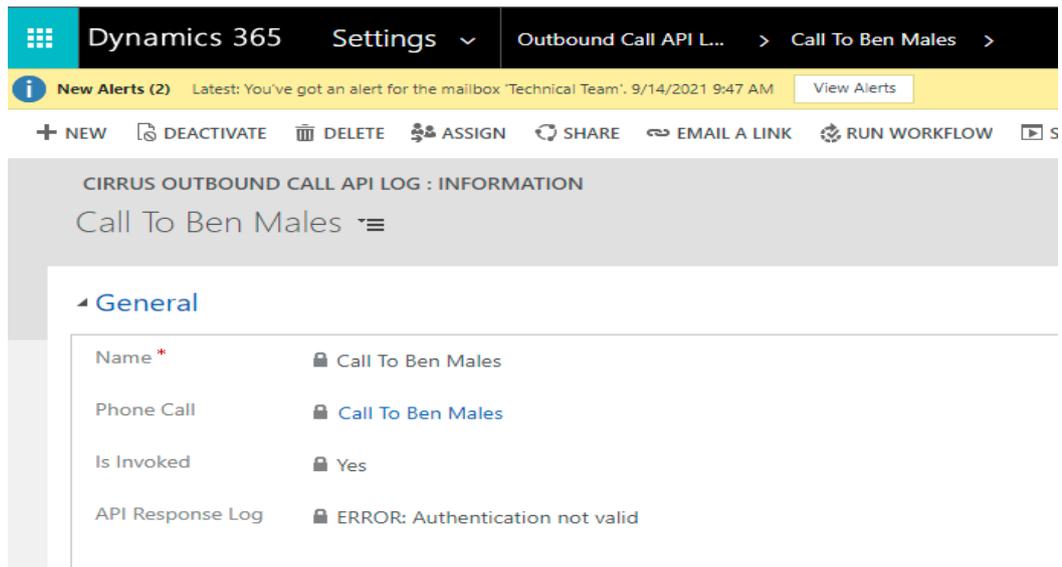
5 Admin Settings

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.
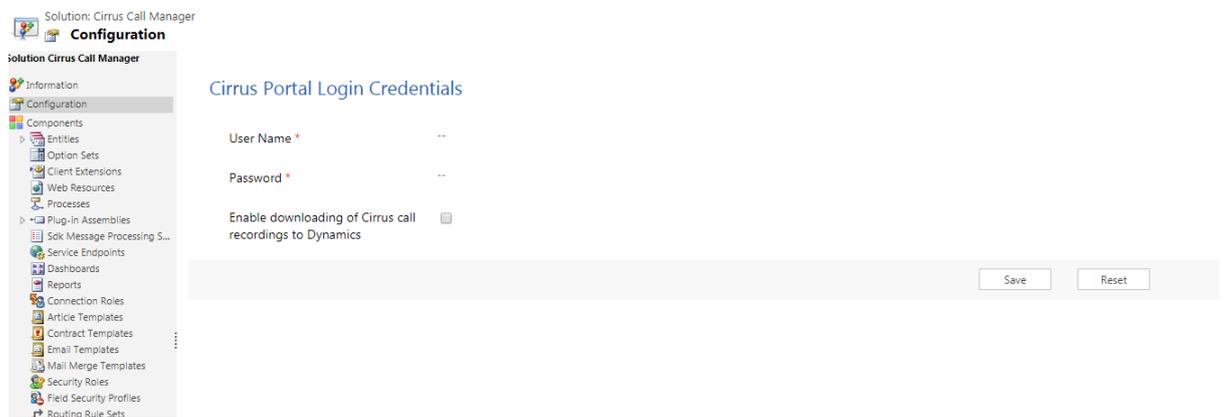
Portal admin credential notification

If the Cirrus Administration Portal user account credentials are changed and are not updated in the Cirrus Call Manager solution within Dynamics 365.
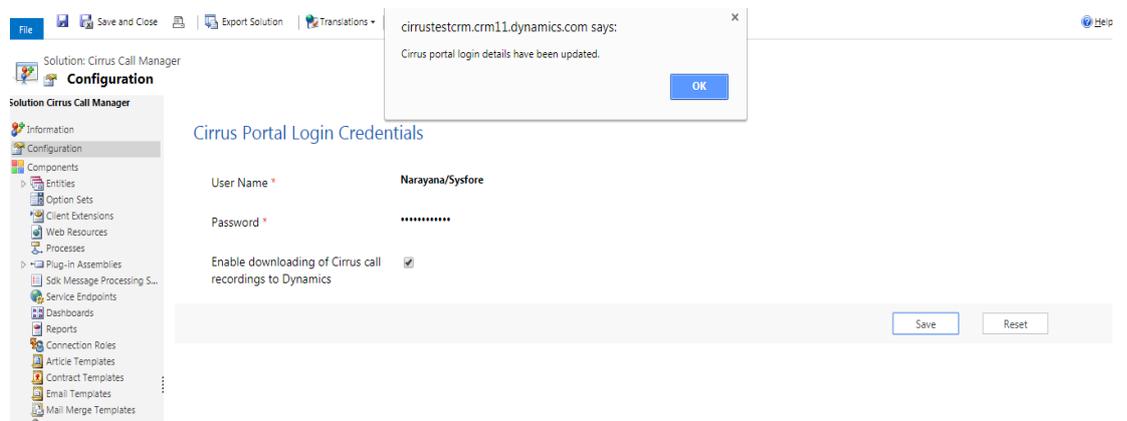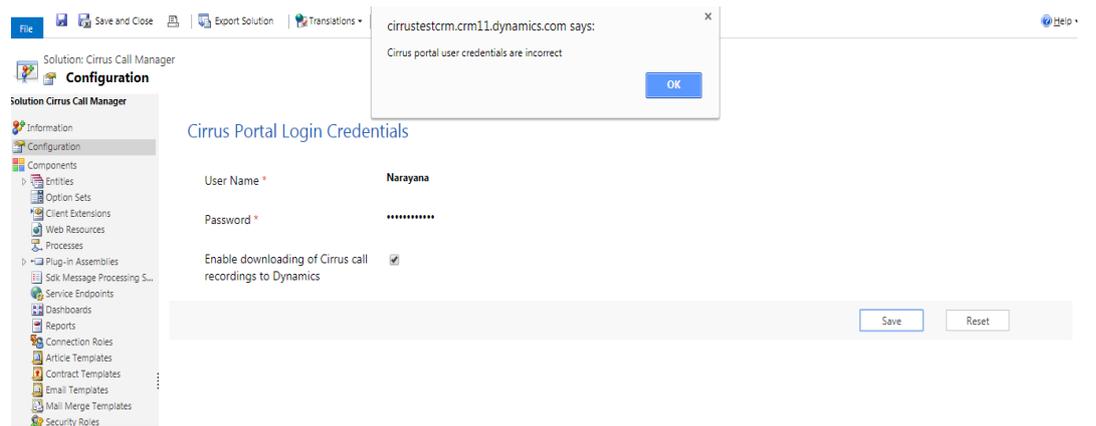
The following error will be displayed on the Phone Call activity record:

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.*
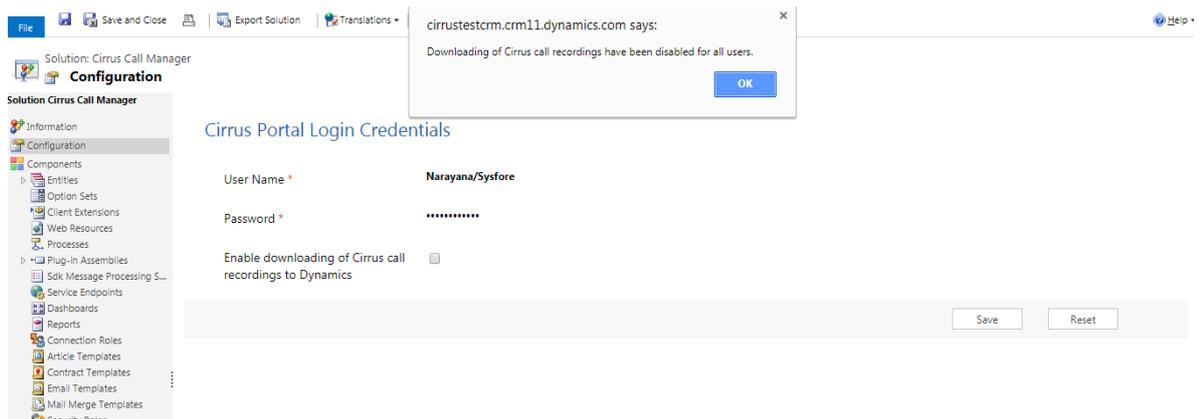
5.2. Cirrus User Agent configurations

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.
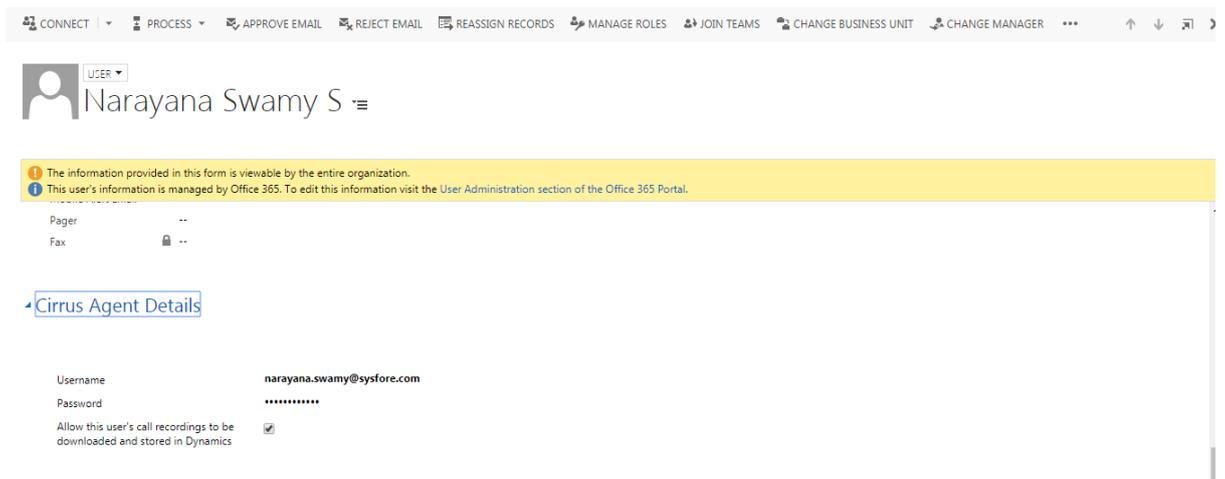
5.2.1. User agent credential validation notification

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.
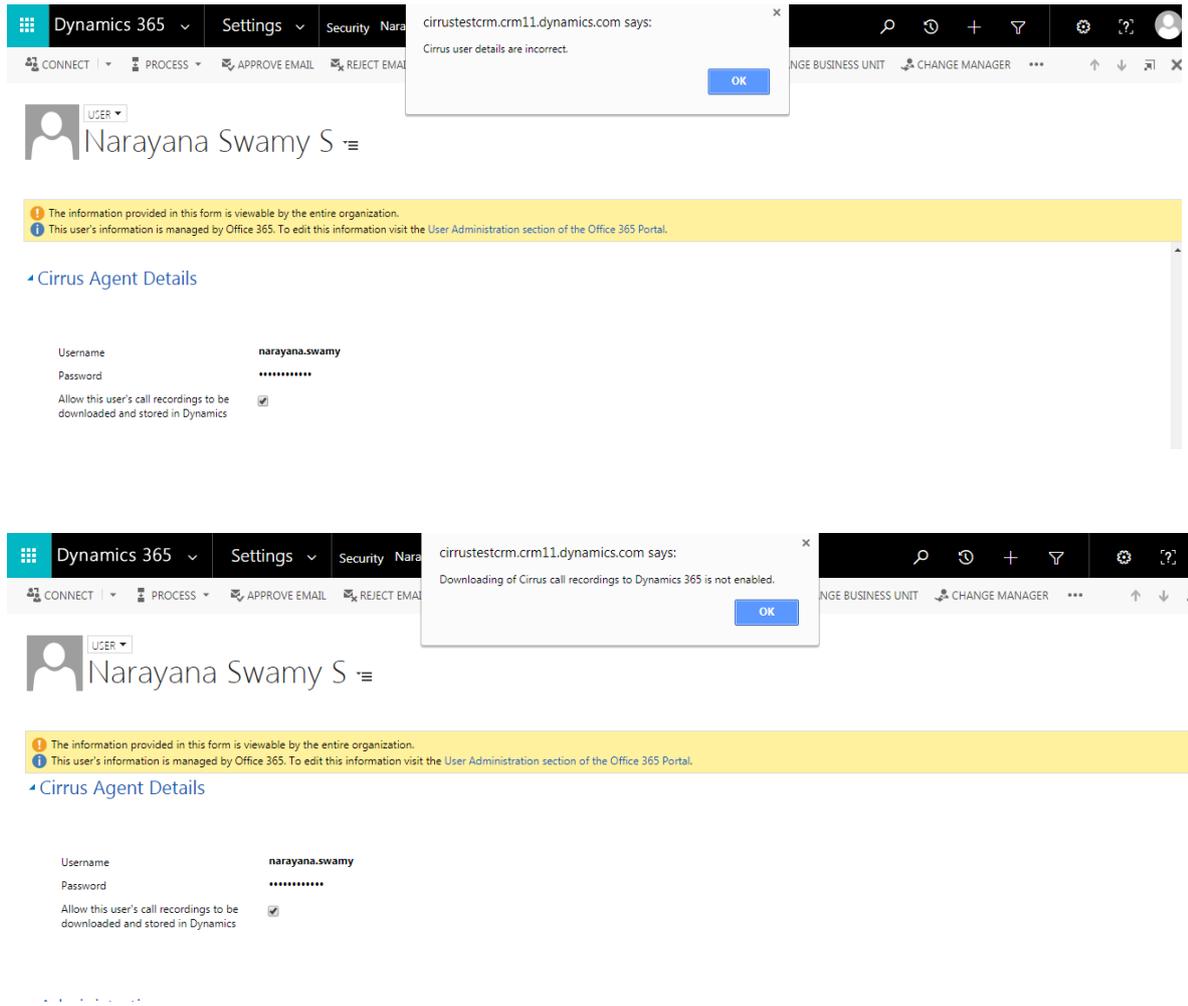
5.3. Cirrus Call Record Log

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:
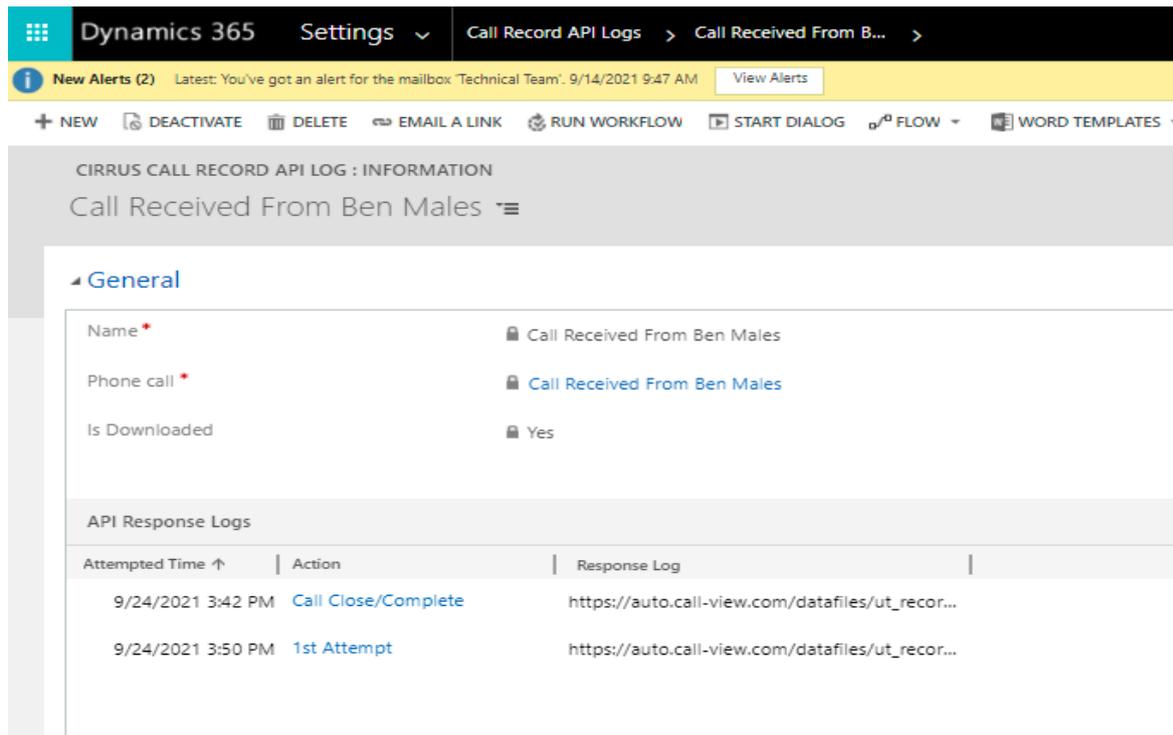
5.3.2. Call Record Response Log

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.
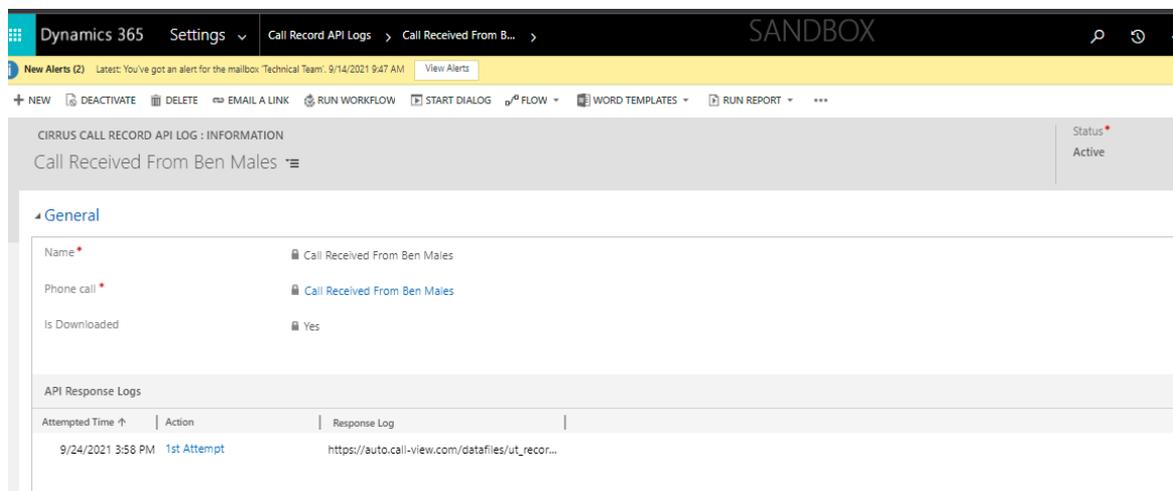
5.4. Cirrus Outbound Response Log

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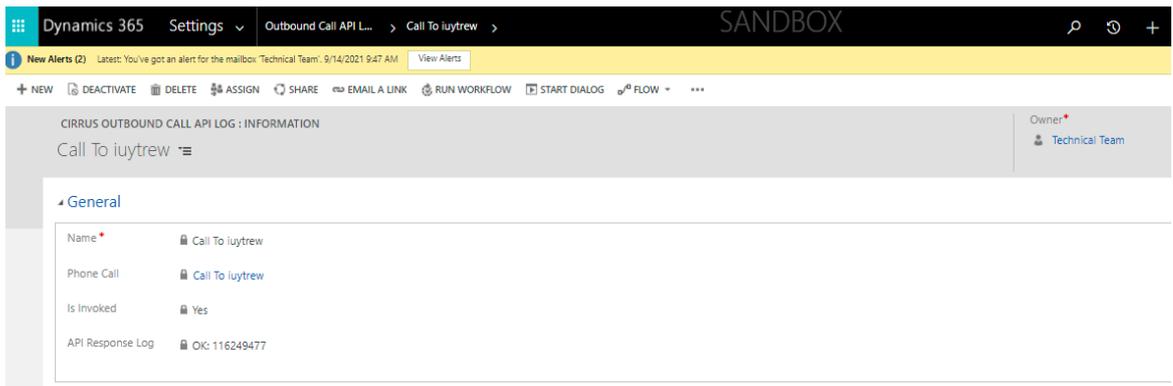
Alternatively, to see logs for an individual Phone Call activity record, navigate to the activity record that you want to investigate, then click the arrow in the navigation header and under the Common section click Outbound API Call Logs:

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