



InteractionSync

Administrator Guide - v2.93.1

Contact center: Genesys Cloud

Publish date: November 12, 2024

Contents

1 About InteractionSync	4
2 Install InteractionSync	6
2.1 Verify admin permissions	6
2.2 Authorize InteractionSync OAuth client	6
2.3 License Genesys Cloud users	7
2.4 Import InteractionSync managed solution	7
3 Update/upgrade InteractionSync	9
3.1 Upgrading within 2.9.x versions	9
3.2 Migrating from v1.8.x to v2.9.x	9
3.2.1 Prerequisites	10
3.2.2 Preparing the upgrade	10
3.2.3 Post-migration validation	12
3.2.4 Channel integration framework updates	13
3.2.5 New configuration options	14
4 Quick setup checklist	15
5 Configure InteractionSync	16
5.1 Configuration tab	16
5.1.1 Genesys Credentials	16
5.2 Softphone settings tab	16
5.3 Activity Mapping tab	20
5.3.1 Custom activity mapping	24
5.3.2 Screen recording URL	24
5.4 Associations tab	24
5.5 Screen Pop tab	25
5.5.1 Default queue configuration	25
5.5.2 New queue configuration	27
5.6 New Interaction tab	29
5.7 Interaction details tab	30
5.7.1 Attribute options	31
5.8 Notifications tab	32
5.8.1 Available interaction attributes	33
5.9 Tab Views tab	35
6 Configure InteractionSync for the Unified Interface	36
6.1 Install Channel Integration Framework	37
6.1.1 Set up CIF v1 option	37
6.1.2 Set up CIF v2 option	39
6.2 Auto-associate new entity on save	42
7 Screen pop configuration	44
7.1 Default data by media type	44
7.2 Web chat	45
7.3 Specific Dynamics entity	45
7.4 New entity	46
7.5 Dynamics global search	47
7.6 Using Dynamics openForm API	47
7.7 Using Dynamics entity query	48
7.8 New screen	48
7.9 Disable pop	48

7.10 Screen pop & phone number formatting	48
7.10.1 Default screen pop behavior	49
7.10.2 Prerequisites	50
7.10.3 Example 1: Phone number format is (317) 232-5555	51
7.10.4 Example 2: Phone number format is 020 7123 7805	53
7.10.5 Summary	53
8 Miscellaneous options	54
8.1 Modify default activity creation	54
8.1.1 Update existing activity	54
8.1.2 Disable activity creation	54
8.2 Prefill Activity To/From when popping Regarding entity	54
8.3 Call recording player within Phone Call activity	55
8.4 Store messaging transcript	55
9 Troubleshooting	57
9.1 Browser logs	57
9.2 Unable to sign in to Genesys Cloud	57
10 Appendix	58
10.1 Uninstall InteractionSync	58
11 Revision history	59

1 About InteractionSync

InteractionSync for Genesys Cloud integrates Genesys Cloud with Microsoft Dynamics 365, linking all your organization's communications with the power of Dynamics 365.

The Genesys Cloud client resides on a sidebar of your Dynamics 365 layout and can handle around 85% of most agent-related actions. But if the need arises to leverage the full functionality of Genesys Cloud, you can simply slide out the entire Genesys Cloud client page, right inside of Dynamics.

While the interface is one of the most visible features of InteractionSync, the real power comes from the automated screen pop and activity creation built within it. InteractionSync intelligently searches Dynamics 365 for the proper contact, lead, or account to pop. Once the interaction is started, InteractionSync automatically creates an activity in Dynamics 365 and associates it to whatever record you want it to.

To further clarify the functionality, let's define two of the primary features:

Screen pops

Screen pop is a mechanism that automatically opens a specific page in Dynamics using existing information or data attached to an incoming interaction. Screen pops assist the agent using Genesys Cloud and Dynamics by "popping" the related page automatically so they do not have to manually search for the page in Dynamics.

- Out-of-the-box screen pop functionality is provided so there is no extra configuration necessary to get screen pops to work after you have InteractionSync installed.
- Custom screen pops can also be configured by applying attributes, or 'participant data' to the interaction.

Automatic activity creation

Activities in Dynamics are tasks that you or your teams perform when they contact customers, for example, sending emails or making telephone calls. You can create activities for yourself, assign them to someone else, or share them with other users or teams.

From a contact center perspective, most organizations want to log each interaction made to and from Genesys Cloud as an activity in Dynamics. These activities can then be related to Contacts, Leads, Accounts, Cases, etc. The process to manually create an activity while on an interaction while working on a case or opportunity can be time-consuming and distracting for agents; InteractionSync automatically creates these activities for the agent, increasing their efficiency as well as enabling them to provide a better customer experience.

Automatic activity creation is designed so the agent should never actually have to navigate to the activity. They can if they need to/want to, but it's not necessary for creating and/or updating. Everything can be done in the embedded Genesys Cloud client's call log and the notes/associations are handled by InteractionSync.

Agent Assist

Agent Assist is an add-on tool that requires licensing from Genesys Cloud. Currently, Agent Assist supports only Voice, Facebook, WhatsApp, Web Messaging, and Email interaction types. For more information, see <https://help.mypurecloud.com/articles/about-genesys-agent-assist/>.

2 Install InteractionSync

2.1 Verify admin permissions

Before proceeding with the installation, verify the user performing the install has the **admin role** or a role with the following permissions:

- authorization:role:All Permissions
- authorization:division:All Permissions
- oauth:client:All Permissions

If the user permissions need to be edited, have an administrator alter the user's permissions. See <https://help.mypurecloud.com/articles/check-a-users-permissions/>.

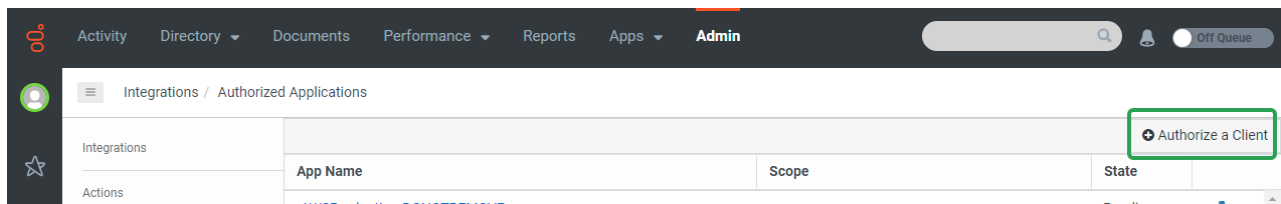
2.2 Authorize InteractionSync OAuth client

Genesys Cloud uses *OAuth scopes for applications* to enhance security and privacy by limiting the data accessible by an external application. InteractionSync must be authorized as an approved application for it to be used within your Genesys Cloud org.

For information, see <https://help.mypurecloud.com/articles/about-oauth-scopes-for-applications/>.

Note: If not properly authorized, users will not be able to log in to the Genesys Cloud embedded framework within InteractionSync. See *Unable to sign in to Genesys Cloud*.

1. In Genesys Cloud, click **Admin** in the top menu.
2. Under the Integrations section, click **Authorized Applications**.
3. Click **Authorize a Client**.



4. Enter the appropriate client ID from the table below based on your Genesys Cloud region and click **Authorize client**.
5. Click **Approve**.

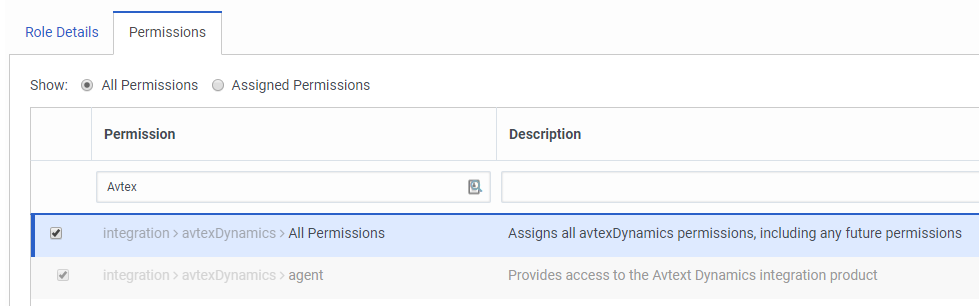
Region	URL	Client ID
US East	apps.mypurecloud.com	c641aa1d-9e06-4ffa-afca-44034b223ac2
US West	usw2.pure.cloud	8cda3730-67e1-4457-a8c0-c49122e9e813
Canada	cac1.pure.cloud	8cda3730-67e1-4457-a8c0-c49122e9e813
Ireland	mypurecloud.ie	8bf0eafa-b5c2-4fa2-8f05-db17418dd7d2

Region	URL	Client ID
Australia	mypurecloud.com.au	cf581632-a0e6-4f09-8f72-8155f15d2040
Japan	mypurecloud.jp	8bc3f2fd-a2ac-4fcc-9f1b-04581acfdcfb
Germany	mypurecloud.de	0f9ef94f-fa04-4318-863d-966268416131
EU (London)	apps.euw2.pure.cloud	8cda3730-67e1-4457-a8c0-c49122e9e813
Asia Pacific (Seoul)	apne2.pure.cloud	8cda3730-67e1-4457-a8c0-c49122e9e813
Asia Pacific (Mumbai)	apps.aps1.pure.cloud	8cda3730-67e1-4457-a8c0-c49122e9e813

2.3 License Genesys Cloud users

InteractionSync licensing is managed through Genesys Cloud permissions. It is highly recommended to use Genesys Cloud roles to apply permissions to numerous people. Below is the suggested approach to assign this role to any user who needs InteractionSync for Genesys Cloud available within Dynamics.

1. In Genesys Cloud Admin, go to **Roles / Permissions**.
2. Locate your desired role or create a new role.
3. Go to the **Permissions** tab on the role.
4. Locate **integration>avtexDynamics>All Permissions** and select the permission to enable it.
5. Click **Save**.
6. If this is a new role or you need to assign additional users to this role, open the role.
7. Click **Change Membership**.
8. Add the required users to receive this new role.
9. Click **Save** after adding users and again to save the role.



2.4 Import InteractionSync managed solution

To import the solution, user must be an admin in the Power apps admin center and Dynamics.

1. Navigate to **Environments** and choose the appropriate environment to install.
2. Go to **Solutions** and select **Open AppSource** at the top of the page.

3. Search for and select **InteractionSync for Genesys Cloud**.
4. Click **Free Trial** to install. You will be redirected to Power Apps with the installation page.
5. Select the environment from the drop-down.
6. Confirm acceptance for EUA/EULA.
7. Click **Install**.

Result: The solution should now show in the Dynamics 365 list of installed solutions.

3 Update/upgrade InteractionSync

The process to update your existing InteractionSync environment depends on the version you currently have installed.

3.1 Upgrading within 2.9.x versions

Applying an update to InteractionSync is essentially identical to the original install. After the import of the updated solution, the original settings should not be affected. All users will need to refresh their browser or logout/login to Dynamics to pick up the changes included in the updated solution.

3.2 Migrating from v1.8.x to v2.9.x

This section provides migration instructions for customers currently running InteractionSync for PureCloud version 1.8x.

Key differences between versions

There are several key differences between version 1.8x and version 2.9x:

Side-by-side installation

InteractionSync 1.8x and 2.9x were designed to run in parallel to allow for testing and UAT prior to transferring users to the new release. To accomplish this, the following changes were made within the solution:

- The InteractionSync prefix in Dynamics has changed from `ispc_` to `isgc_`. The different prefixes easily identify whether records or data were generated with version 1.8x or version 2.9x and allows the version to run in parallel.
- New security roles have been created for use with version 2.9x: *InteractionSync for Genesys Cloud Admin* and *InteractionSync for Genesys Cloud User*. These new roles allow access to version 2.9x by role or user.

Support for Dynamics 365 CIF v1 and CIF v2

The 2.9x version includes support for both Channel Integration Frameworks v1 and Channel Integration Framework v2 (Customer Service Workspace/Omni-Channel Integration). Version 1.8x will be unable to support CIF v1 and v2 in the future.

Online Only

Version 2.9x supports Dynamics Online only. It does not support use in an on-premises environment. This allows us to innovate faster without the limitations of on-premise environments.

Known issues or limitations

The following issues exist in the current upgrade process:

- A spelling error exists on the Configuration Upgrade Dialog window. This will be resolved in a future release.

Legacy data migration

With the release of InteractionSync version 2.9x, the schema prefix has changed to `isgc_`, requiring the creation of new fields for all the standard Dynamics mappings (e.g., Conversation ID, Wrap-Up Code, Queue).

A Phone Call Entity in Dynamics now contains:

- a new form called Genesys Cloud Phone Call
- new fields in the Phone Call entity that start with `isgc_` (the legacy fields start with `ispc_`)
- new activities for Chat, Callback, SMS that start with `isgc_` to reflect their association with the new solution

Data from InteractionSync will write data to the new `isgc_` fields in Dynamics and will no longer, by default, write to the `ispc_` fields – there will be Genesys call data in two different sets of fields depending on which version of InteractionSync was used. This may impact reporting but will not impact functionality.

Workaround

In the new InteractionSync solution, the “Activity Mapping” section can be configured to write Genesys Call Attributes to the legacy `ispc_` fields so that both sets of data fields are populated.

Important: Do not uninstall v1.8x of InteractionSync as that will remove the `ispc_` fields and may result in data loss. If you want to uninstall version 1.8x and preserve the data from the legacy entities, you must export the data from Dynamics so it can be reimported or migrated to the new fields or activity types.

3.2.1 Prerequisites

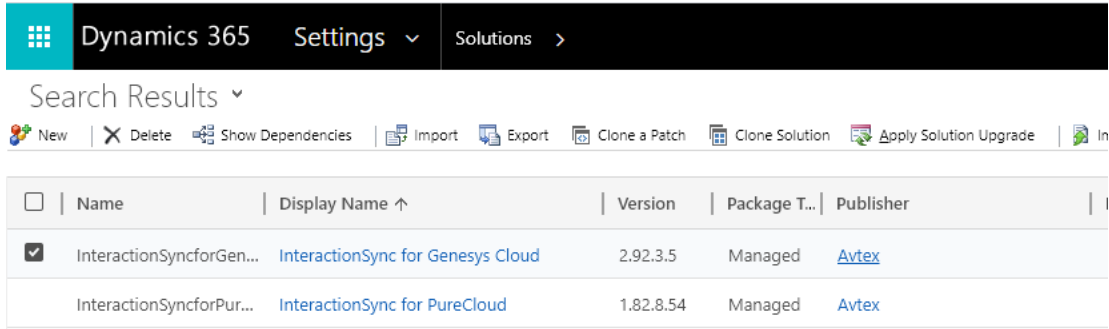
Prior to beginning the upgrade and configuration migration process, confirm that:

- InteractionSync for PureCloud, version 1.8.x is installed and operational in your Dynamics environment.
 - On premise: InteractionSync 1.82.8 support Dynamics 2016, specifically Dynamics 2016.1 or 8.1 or higher under the assumption that classic web client is used.
- There is at least one (1) Channel Provider configured for InteractionSync.
- InteractionSync for Genesys Cloud, version 2.9.x is installed in your Dynamics environment. See [Import InteractionSync managed solution](#).

3.2.2 Preparing the upgrade

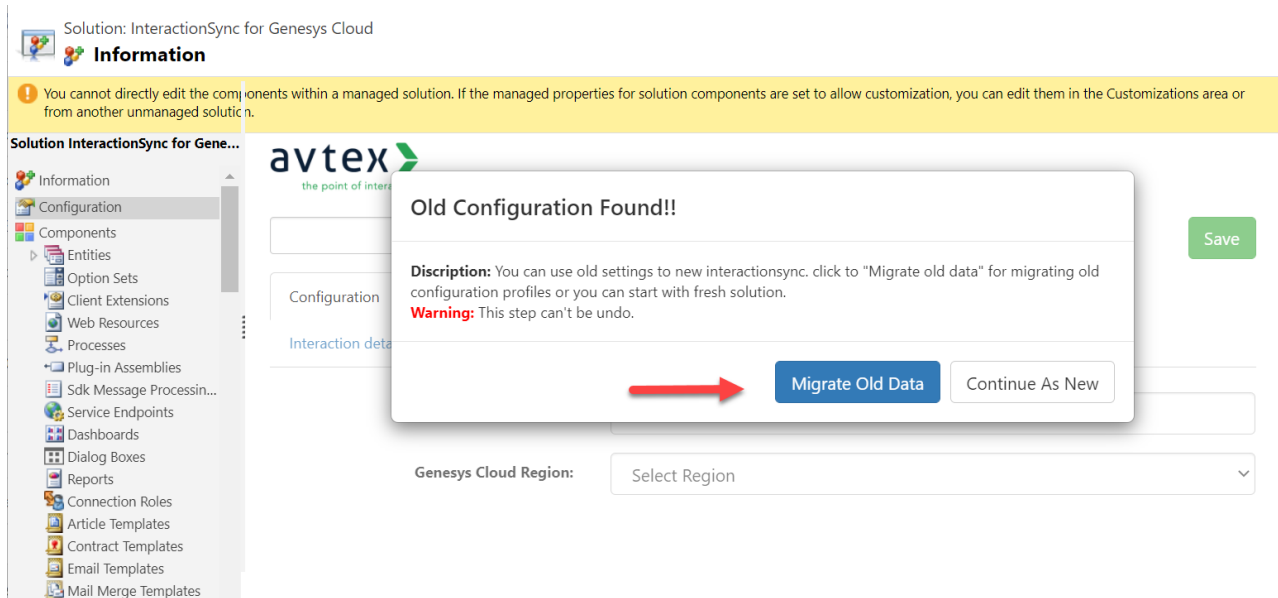
To prepare the upgrade, follow these steps:

1. In Dynamics 365, navigate to **Settings > Solutions**.
2. Search for InteractionSync. Both versions 1.8x and 2.9x are listed in the search results.
3. Select **InteractionSync for Genesys Cloud** to open the solution. You will be re-routed to the solution Configuration Page.



4. If this is the first time you are opening the configuration page, you will be prompted with the message below, and given the option to either Migrate Old Data or Continue As New.
 - **Migrate old data:** The solution will execute the migration process and migrate InteractionSync configurations from version 1.8x to 2.9x. Errors are reported back and may require manual intervention. See [Post-migration validation](#).
 - **Continue as New:** The solution will *not* migrate legacy configurations. Proceed with configuring the solution manually as a new install. See [Configure InteractionSync](#).

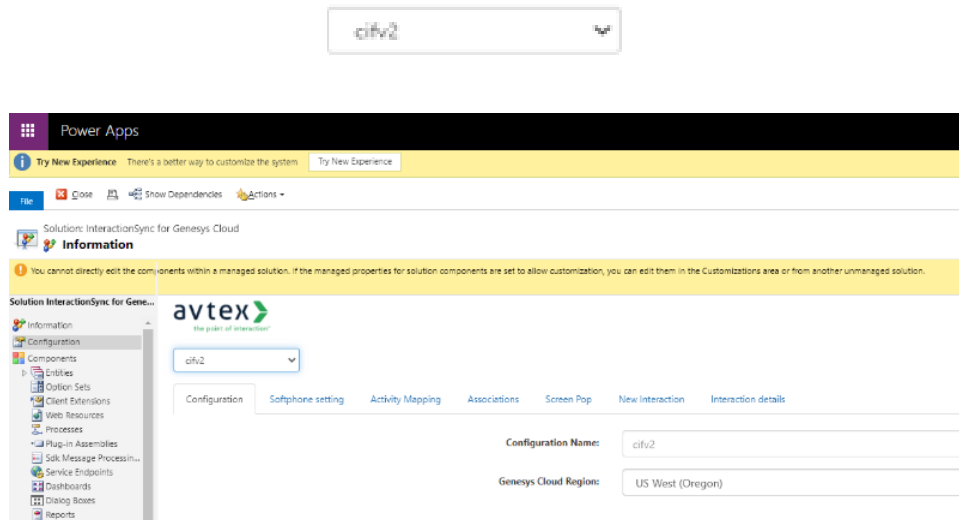
Note: You may refer to your legacy configurations as a guide to manually configure your new install. See [Post-migration validation](#) and refer to step 3 for comparing and manually updating your configuration.



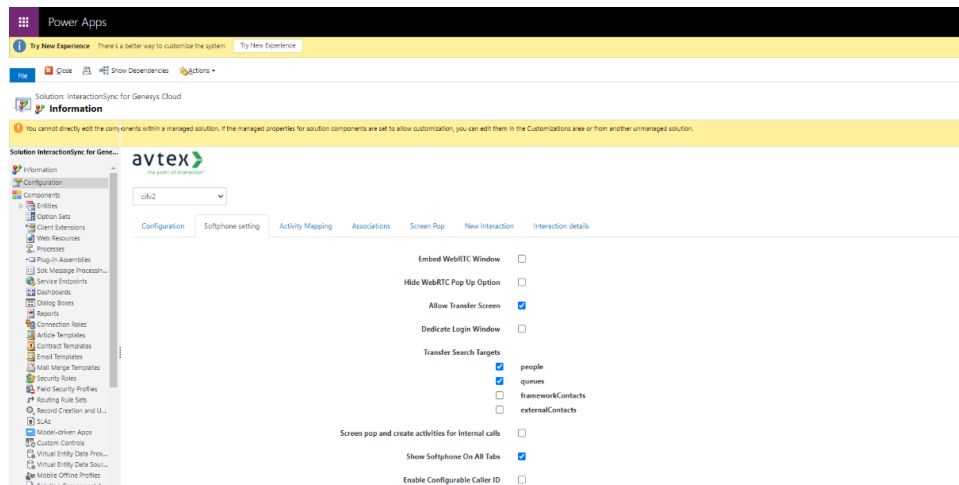
3.2.3 Post-migration validation

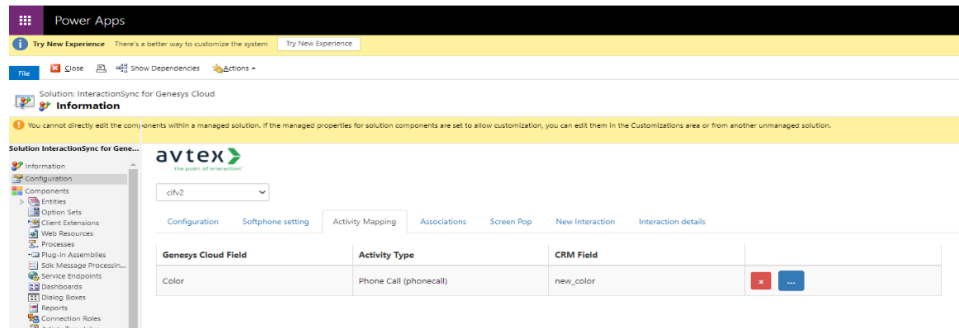
If you chose **Migrate Old Data** from the configuration window, follow the steps below to validate that your configuration has migrated properly.

1. Go to **Settings > Solutions** and select the solution's Configuration page. Click the configuration drop-down to verify that your new configurations are present.



2. Review all configuration tabs within the new settings, comparing to the configuration tabs within your original settings to confirm the proper settings have migrated (i.e., Configuration, Softphone Settings, Activity Mapping, etc.).





3. If some settings have not migrated properly, manually update them using your original settings (select the older configuration from the drop-down menu) as a guide.

Note: If errors were presented during the migration process, ensure those areas are checked and updated accordingly.

3.2.4 Channel integration framework updates

Once the migration process is complete and you are ready for users to begin using version 2.9x, update the configuration profiles in the Channel Integration Framework.




Update the existing channel providers to:

- Use the new URL: <https://interactionsync.avtexcloud.com>
- Remove previous roles
- Assign the new InteractionSync for Genesys Cloud Security roles

If you are not ready to cut over to the new version, you can create a new channel provider to allow users to test the new version. See [Install Channel Integration Framework](#) for instructions on creating a channel provider.

Important: You must configure the settings in the solution for the new profile.

When creating a new CIF profile, be sure to set a string value for the custom parameter. The custom parameter is specifically tied to the name of the configuration profile such that one configuration profile matches each Channel Provider.

Name	* InteractionSync for Genesys Clouds
Label	* InteractionSync for Genesys Clouds
Channel URL	* https://interactionsync.avtexcloud.com 
Enable Outbound Communication	* Yes
Channel Order	* 1
 API Version	1.0
Trusted Domain	---
Custom Parameters	sbs 

3.2.5 New configuration options

The latest version of InteractionSync for Genesys Cloud contains several new features allowing more control over:

- how searching works for Inbound and Outbound Interactions
- new options for screen pops
- new configuration options for record matching, etc.

Review [Configure InteractionSync](#), [Screen pop configuration](#), and [Miscellaneous options](#) for more information on features.

4 Quick setup checklist

This guide covers all aspects of the solution including all the configuration and customization capabilities of the solution. While these parts are key to getting the most out of the solution, they are not required to get the solution deployed and working out of the box.

Below is an ordered list of steps to get the solution up and running with the basics within 30 minutes!

Genesys Cloud tasks

This section is to be performed by Genesys Cloud administrators who have privileges to approve applications and create Genesys Cloud roles.

1. [Verify admin permissions](#)
2. [Authorize InteractionSync OAuth client](#) - the InteractionSync application must be approved for use within the Genesys Cloud org for security purposes. See
3. [License Genesys Cloud users](#) - Create Role to assign InteractionSync license – Genesys Cloud roles control license assignment to users. For a user to use InteractionSync, they must have a role assigned which has the correct permission.

Microsoft Dynamics 365 tasks

This section is to be performed by Dynamics 365 administrators who have privileges to import solutions and assign roles.

1. [Install InteractionSync](#) – the solution contains entities for writing activities and storing InteractionSync configuration within the deployed Dynamics org.
2. [Configure InteractionSync for the Unified Interface](#) – Microsoft's Channel Integration Framework (CIF) component is required to utilize InteractionSync softphone within Dynamics Unified Interface.
3. [Configure InteractionSync](#) – InteractionSync provides a comprehensive set of configuration settings which initially set with defaults which most users keep. The only required configuration initially is to select the Genesys Cloud org region on the main [Configuration tab](#).
4. [Auto-associate new entity on save](#) – InteractionSync uses OnNavigate events to associate an entity to an activity. This does not work out of the box for new entities thus requiring a small form customization.

5 Configure InteractionSync

InteractionSync configuration allows for creating multiple configuration profiles for different Dynamics roles, business units, or groups of users. Within each configuration profile are numerous settings to control InteractionSync's behavior. Each section below details a tab within the configuration. To get to the InteractionSync configuration, start with these steps:

1. Under Settings > Solutions, select **InteractionSyncForGenesysCloud**.
2. Select **Configuration** in the left column.
3. Select the desired Configuration Profile from the drop-down menu.

5.1 Configuration tab

1. Set **Configuration Name** to a descriptive name for these configuration settings. By default, a configuration named *Default Configuration* is added and used as the base configuration for all users.
2. Select the **Genesys Cloud region** used.

5.1.1 Genesys Credentials

Important: Genesys Cloud credentials are necessary for displaying Voice Transcripts during call interactions and configuring queue-based screen pop settings. To retrieve queues from the Genesys Cloud, credentials must be provided.

1. Go to Genesys Cloud **Admin**.
2. Navigate to **Integrations > OAuth**.
3. Select your **organization**.
4. Copy the Client ID and Client Secret to the Genesys Credentials field in your Interaction Sync Configuration tab.
5. Click **Save**.

Genesys Credentials
Required for Voice Transcripts and Queues

Client Id :	<input type="text"/>
Client Secret :	<input type="text"/>

5.2 Softphone settings tab

The settings tab provides access to numerous Genesys Cloud Softphone control aspects like WebRTC window, Activity generation, and Single Sign-On configuration.

Embedded Interaction Window

Setting	Description
Chat, Email, Facebook, Open messaging, Web messaging, and WhatsApp	Select to enable the embedded interaction window for chats, social media, and email interactions. Agents have the ability to toggle between having an embedded window or a new pop out window. Can minimize or maximize the window as needed. Note: Shelf functionality continues to be supported with the embedded interaction window.
Script for Phone Call	Enable the setting for the scripts to appear in an embedded interaction window for phone call interactions. Agents have the ability to toggle between having an embedded window or a new pop out window. Can minimize or maximize the window as needed. Note: Shelf functionality continues to be supported with the embedded interaction window.
Callback	Select to enable the embedded interaction window for callback interactions. Agents have the ability to toggle between having an embedded window or a new pop out window. Can minimize or maximize the window as needed. Note: Shelf functionality continues to be supported with the embedded interaction window.
Embed WebRTC Window	Controls whether the WebRTC session is embedded within the Dynamics web site (enabled) or a small pop out browser window manages the WebRTC connections (cleared). Note: WebRTC allows the browser to act as a user's phone. While this is a great benefit, there is associated risk if the user navigates away from the page or the browser session closes while connected to a call. In these situations, the call would be disconnected.
Hide WebRTC Pop Up Option	Related to the <i>Embed WebRTC window</i> setting, this allows administrators to restrict whether a specific user can choose either the embedded or pop out WebRTC experience.
Allow Transfer Screen	Select for users to have the availability to transfer a screen when transferring calls between two users who are both using InteractionSync.
Dedicate Login Window	Select if the configured Single Sign On (SSO) provider requires a pop out window when performing the authentication.
Transfer Search Targets	Control which targets should be available when transferring calls: <ul style="list-style-type: none"> • people – Other Genesys Cloud users • queues – Genesys Cloud queues • frameworkContacts – Dynamics CRM accounts, lead, contacts searched by name/number • externalContacts – Genesys Cloud configured external contacts
Screen pop and create activities on internal calls	Select if screen pops should be delivered and activities created for internal or intercom calls. Clear to disable internal calls.
Show Softphone On All Tabs	When running with InteractionSync on all tabs , the initial tab will receive all screen pops. Any subsequent tabs opened will show the softphone but will not receive the screen pop. Additionally, click to call will work on all pages. When running with InteractionSync on only one tab , the initial tab will receive all screen pops and no other subsequent tabs will show the softphone. Click to call works though on all other tabs where the softphone is not shown. Also, association is automatically added to the

Setting	Description
	entity the click to call occurs from.
Minimize Softphone By Default (CIFv2)	<p>Select to minimize the softphone until an interaction is offered.</p> <ul style="list-style-type: none"> • Default for all Users - By default, minimizes the softphone for all the agents • Agent configurable option - Provides the agent an option to enable the setting <i>minimize the softphone</i>. The option will be available within the release information icon on the softphone.
Minimize Softphone On All Tabs	Select for the sidebar to remain minimized until maximized, even when an interaction is offered.
Enable Configurable Caller ID	This setting causes caller ID name and number boxes to appear in the client when agents make calls. The names and phone numbers that agents input appear to recipients of outbound calls. After enabling this setting, configure Calling for your external trunk in your Genesys Cloud organization. For more information, see https://help.my-purecloud.com/articles/configure-caller-id/ .
Enable Call History	Allows agents to view their call history in InteractionSync which includes inbound, outbound, and missed calls.
Override user setting - Click to call Prompt for Queue	InteractionSync softphone provides the ability for a user to change their make call settings to show a Dial From Queue and remember last Queue value. These settings though are controlled by individual users and the settings are stored within the browser which can be cleared if the browser cache is cleared. By checking this option, it will override the user's setting turning on the Prompt for Queue for all users.
Override user setting - Remember last Queue	InteractionSync softphone provides the ability for a user to change their make call settings to show a Dial From Queue and remember last Queue value. These settings though are controlled by individual users and the settings are stored within the browser which can be cleared if the browser cache is cleared. By checking this option, it will override the user's setting to remember the last queue value.
Outbound Default Queue ID	This setting allows the admin to set the queue ID to default when an outbound interaction occurs. When the cache is cleared and the selected queue is removed, default queue ID is populated.
Click to Dial from closed Activities	This setting allows the admin to initiate the interaction from closed activities. By default, the setting is enabled.
Store Conversation Transcript <ul style="list-style-type: none"> • Voice • Chat • Facebook • WhatsApp • WebMessaging • SMS • Line • Open 	This setting refers to the functionality to store the message transcript that happen between the agents and customers. InteractionSync provides a checkbox to enable the desired messaging interaction(s) for storing the message transcripts in the activity record.
Screen pop on Interaction Pickup	Enable to deliver the screen pop when a new interaction is picked up by the agent.

Setting	Description
Allow Activity ScreenPop for Outbound interaction	<p>Enable to allow screenpop of Entity and created activity on Interaction Pickup for all interaction.</p> <p>Important:</p> <ul style="list-style-type: none"> • This setting is available only for CIFv1. • In CIFv2, the setting has been removed from the softphone settings. Therefore, the ISync admin must reconfigure it in the screen pop settings to meet their requirements.
Close Activities on Event	<p>Configures if activities should be automatically closed and when the activity should close. Once an activity is closed, no subsequent updates can be made to the activity. The options for closing the activity are as follows:</p> <ul style="list-style-type: none"> • Wrap – Close the activity once the wrap up code is set on the interaction. • Deallocate – Close the activity when the interaction removes from the interaction view. • Do Not Close – Leaves the activity open.
Enable Service Side Logging	<p>The integration saves logs server-side (true) or does not save logs server-side (false). If set to true, Genesys Customer Care can access these logs directly, eliminating the need for you to send the logs. This should only be turned on at Support's request.</p>
Screen pop to new tab while editing	<p>When Dynamics is popped for a new interaction, it defaults to screen popping to the last selected Dynamics window. If the Dynamics user was in the middle creating or editing something, the screen pop will cause the page to navigate away. With this setting checked (true), InteractionSync will send the screen pop to a new page instead of popping to the existing page so the user can continue to work on the original create or edit.</p>
Set pixel width of the softphone	<p>Width in pixels for the softphone. Default value is 441. Use this setting to increase or decrease the width of the softphone</p>
Default SMS Country	<p>Default Outbound SMS Country Code allows you to control which country code appears in the client when agents send outbound SMS messages.</p>
Interaction Activities	<p>A key feature of InteractionSync is the automatic creation of activities for interactions handled by each user.</p> <ul style="list-style-type: none"> • 'None' states no interaction activities should be created • 'User Selected' indicates the activity is only created when the user requests to open the activity • 'All' indicates all interactions handled should have a corresponding interaction.
Global Search Type	<ul style="list-style-type: none"> • Categorized Search- Provides the search results in Dynamics 365 grouped by entity type. • Relevance Search- Provides the search results in Dynamics 365 across multiple entities. <p>Known issue: Relevance Search expected behavior is not seen in CIFv2.</p>

Setting	Description
	Associations will not work as expected. Note: To use the Relevance Search feature in InteractionSync , it must be enabled in your environment.
Call controls	Manage which call controls are visible for the user within the softphone. The only two which cannot be removed are pickup and disconnect.

Single Sign On

Genesys Cloud supports numerous SSO providers, and this section of settings will allow for InteractionSync to all support the configured SSO providers.

Setting	Description
SSO Provider	The SSO Provider name is needed for InteractionSync to know which provider to redirect the authentication request. The list of supported provider names are as follows: adfs, cic, gsuite, identitynow, okta, onelogin, ping, purecloud, salesforce. See Genesys Cloud Resource center for more details.
Genesys Cloud Org Name	Provide the name of the Genesys Cloud org being used with InteractionSync. This is the org name found in the Genesys Cloud Admin > Organization Settings.

Post Call Survey

InteractionSync provides the ability for a user to transfer the call to a survey, once the call is connected. These settings are controlled by administrator and are stored within the CRM environment.

Setting	Description
Allow Post Call Survey	Select this option for the icon to appear on the InteractionSync sidebar. Upon clicking the icon, the call gets disconnected and is transferred to the IVR survey. Upon enabling this option, IVR Flow Name and Survey Frequency settings appear.
IVR Flow Name	InteractionSync softphone provides the ability for the admin to set up the IVR Flow name in their respective Genesys Cloud environment. The automated voice guides the customers through the survey process.
Survey Frequency	Provides the ability to set the frequency at which call interactions are sent to a post call survey via the Survey Frequency setting. From the drop-down select the desired interval, you want the call to be sent for survey. Intervals can be chosen in 1-30 days. Note: Survey Frequency setting has the option to select N/A from the drop-down, i.e; surveys can be offered to customers without any set frequency or limitations.

5.3 Activity Mapping tab

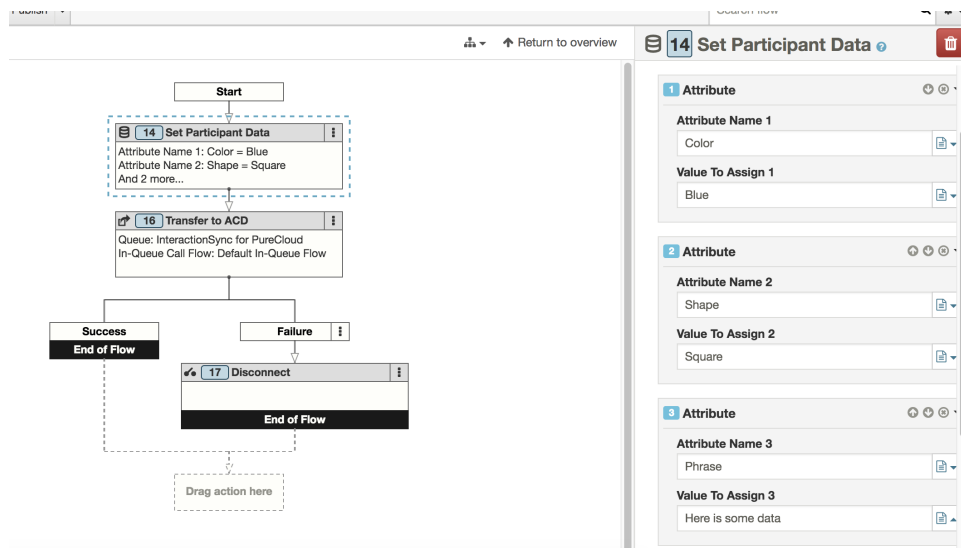
Activity mapping is the process of synchronizing attributes on interactions and writing them Dynamics activity during and after the interaction. Below is a list of the attributes which are automatically assigned by interaction type.

Dynamics Field Name	Genesys Cloud Field	Applies to Dynamics Activity	Description
from	N/A	All	Who initiated the interaction (for inbound, this is the customer contact, lead, account while outbound it would be agent system user)
to	N/A	All	Who received the interaction (for inbound, this is the agent system user while outbound it would be the customer contact, lead, account)
regarding	N/A	All	Associated entity which interaction was associated (Case, Opportunity, etc.)
actualstart	Calculated	All	Interaction Actual start date/time
actualend	Calculated	All	Interaction Actual end date/time
subject	Interaction Log User Entered	All	Subject of the interaction activity. Format is [InteractionType] [Date] [Time] (Ex: Call 10/10/2020 06:45AM)
description	Interaction Log User Entered	All	Notes documenting conversation within softphone
isgc_duration	formattedDuration	All	Formatted duration of interaction HH:MM:SS
isgc_durationseconds	interactionDurationSeconds	All	Total duration of interaction in seconds
isgc_interactionid	id	All	Genesys Cloud interaction Id
isgc_interactionurl	interactionUrl	All	Genesys Cloud URL to the interaction details view
isgc_screenrecordingurl	screenrecordingUrl	phonecall	Genesys Cloud URL to record the screen during the interaction. Refer Screen recording URL for more information.
isgc_queueName	queueName	All	Queue name for ACD delivered interactions
isgc_remoteName	remoteName	All	Remote name of the interacting party
isgc_wrapup	disposition	All	Wrap-up code for ACD delivered interactions
isgc_callednumber	calledNumber on inbound calls	phonecall, isgc_callback	DNIS for inbound calls
directioncode	direction	phonecall	Inbound or outbound call
phoneNumber	For inbound, inboundPhoneNumber For outbound, ani	phonecall	Customer's phone number

Dynamics Field Name	Genesys Cloud Field	Applies to Dynamics Activity	Description
isgc_emailaddress	For inbound, calledNumber For outbound, ani	isgc_email	Customer's email address
isgc_directioncode	direction	isgc_email, isgc_message	Inbound or outbound
Transcription	Calculated	isgc_chat	Stores the chat transcript as an annotation to the chat activity
isgc_isvoicemail	isVoicemail	isgc_callback	Callback was created from a left voicemail
isgc_messagetype	messageType	isgc_message	Message interaction type is for numerous messaging interactions including (SMS, Facebook, Line, WhatsApp, etc.). This field denotes which message type it is.

While there is a great deal of data written with the out-of-the-box solution, InteractionSync provides a way to write other attributes on interactions to the Dynamics activity.

Genesys Cloud provides numerous other attributes which can be mapped. Review the list in the Interaction attributes section available here: <https://developer.mypurecloud.com/api/embeddable-framework/condensed-conversation-info.html>. The Genesys Cloud field in the above table references fields from this page which are used. To demonstrate how to create additional custom attributes and map though, let us look at an inbound call flow in Architect:



Step 14 in this flow, 3 custom attributes are set to this call interaction:

- Color = "Blue"
- Shape = "Square"

- Phrase = "Here is some data"

Even though these are not realistic values, they show how to get these values from the call stored on the Dynamics Activity. After the call passes through the call flow, it will be delivered to the appropriate queue and eventually assigned to an agent with these values attached

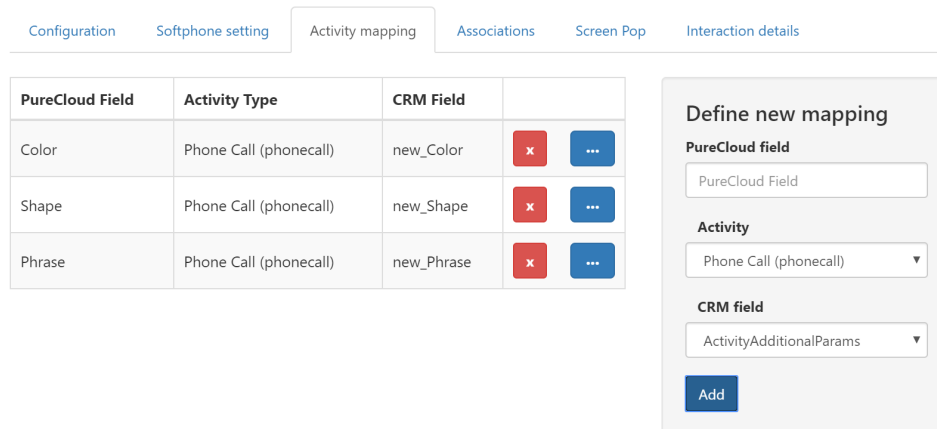
Under the Activity Mapping tab is the ability to build these mappings.

- The first textbox is the name of the Genesys Cloud custom attribute to map into Dynamics.
- The second area, Activity, is looking for the Genesys Cloud interaction type for this mapping. This allows for different mappings by Interaction Type.
- The third area is to select the Dynamics field to write the value in the Dynamics Activity. By selecting the drop-down, all the available fields are available on the Activity type.

InteractionSync supports numerous field types for synchronizing to the Dynamics activity. Below is a table showing each data type and how the Genesys Cloud attribute should be set to synchronize correctly.

Dynamics Data Type	Genesys Cloud setting description
Single Line of Text, Multiple Lines of Text	Set as a string. Ex: "Hello"
Boolean (Yes/No)	Yes, should be set as "true" and No should be set as "false"
Option set	Set the option set value for the item to select. This is numeric. Ex: "2"
Whole Number, Floating Number, Currency	Set numerous as a string. Ex: "123", "1234.2344", "45.67"
Date / Time	Send date time in string format and it will be converted. "2015/1/4 10:10:45AM"
Lookup	Send selector string with type and GUID. Ex: "/contacts(DFE54660-37CD-E511-80DE-6C3BE5A831DC)"

Below is an example screenshot of the configuration based on the Architect settings above.



5.3.1 Custom activity mapping

InteractionSync automatically creates and writes activities matching the respective activity types.

Activity Type	Activity created/written
Call	phonecall
Chat	isgc_chat
Genesys Cloud Email	isgc_email
Genesys Cloud Message	isgc_message
Callback	isgc_callback

InteractionSync supports the ability to use an existing activity instead of creating a new activity when handling an interaction using the `IS_ActivityId` attribute. This can be used with any Dynamics Activity type outside the standard phonecall activity and the Genesys Cloud specific Activity types.

Based on the activity type set in `IS_ActivityId`, `IS_ActivityType`, and `IS_ActivityTypePlural` fields, the mapping defined for that Dynamics activity type is used.

For instance, if `IS_ActivityType` is set to *appointment*, any mappings in the "Activity mapping" tab for an Appointment type mappings.

5.3.2 Screen recording URL

InteractionSync for Genesys Cloud supports screen recording for the phone call interaction. Genesys Cloud Background Assistant (GCBA) must be installed to access the screen recording feature.

GCBA performs the screen recording activity when phone interaction is performed and presents the URL to the users with the admin roles in the activity record.

For more information, see <https://help.mypurecloud.com/articles/about-genesys-cloud-background-assistant-gcba/>

Important: Only the users with **Interaction Sync for Genesys Cloud Admin** roles and **CRM System Admin** roles, have the ability to access this feature.

5.4 Associations tab

InteractionSync can automatically create activities for all interactions handled by an agent. Within the activities are numerous fields which relate to *who* and *what* the activity is related. For instance, Phone Call activity has *To*, *From*, and *Regarding*. InteractionSync can automatically auto-associate these activities based on what is popped as well as where the agent navigates during the interaction. Selecting *Auto Association* will ensure these associations are set while managing interactions.

In a typical implementation, numerous entities are setup with *Has Activities* which makes those entities available in the *Regarding* field. Using the *Define association* allows definition of which of these entities should be monitored and automatically associated. Also within the Association configuration is the Association field which drives what is shown InteractionSync Call Log under the *Related To* drop-down.

Using the Associations configuration, administrators can control which entities should be automatically assigned to the activity during a screen pop or manual navigation.

For instance, take the configuration below. Based on the configuration and the agent opens a case during the active call, the *Related To* will automatically be assigned to the case selected with the Case Title shown.

Auto Associate

CRM Entity	Field Associate	
Case	Case Title	X ...
Opportunity	Topic	X ...

InteractionSync

Indianapolis IN

Call 4/18/2021, 12:36:43 PM

Name: Alex Cuddington - contact

Related To: Reset Password - incident

Interaction Log Notes

5.5 Screen Pop tab

InteractionSync has comprehensive control over how and what is screen popped when an interaction is delivered. In addition to controlling what and how an entity is search, the Screen Pop configuration allows control of what is opened based on the number of matches, one, many or no matches. This logic applies to both inbound and outbound interactions.

5.5.1 Default queue configuration

InteractionSync default screen pop search consist of searching numerous entities across numerous fields. In previous releases, this search was set to use specific fields. The new configuration allows for control of what entities are searched, what fields are searched, and any additional filters are performed on the search.

The default screen pop occurs if none of the special attributes are set to drive a specific screen pop. For instance, IS_EntityId and IS_EntityType attribute drives a specific entity to be popped. If those are set, the default screen pop will not occur. The default screen pop is the fallback screen pop if no other screen pop is requested or executed.

1. From the Screen Pop tab, navigate to **Select Queue**.
2. Select the **Default Queue** from the drop-down to reveal the following settings.

Setting	Description
No matching records	<p>Action to execute when no matching records are found. The options are as follows:</p> <ul style="list-style-type: none"> • Pop a new entity – Open a new entity. See “Open New Entity” and “Set Phone Number” settings for more control over this configuration • Don’t pop screen – take no action when the interaction is delivered to the agent
Open New Entity	<p>Select the entity to open when no match is found. This allows different business units to control which entity should be opened. For instance, Customer Service may pop open a new Contact while Sales may pop open a new Lead.</p>
Set Phone Number	<p>When opening the new entity defined above, specify which field to automatically set the phone number of the incoming call.</p>
One matching record	<p>Action to execute when one matching record found. The options are as follows:</p> <ul style="list-style-type: none"> • Don’t pop screen - take no action when the interaction is delivered to the agent • Pop Detail page – open the entity detail form
Multiple matching records	<p>Action to execute when multiple matching record founds. The options are as follows:</p> <ul style="list-style-type: none"> • Don’t pop screen - take no action when the interaction is delivered to the agent • Pop to search page – Open global search page using the search term (phone number, email address)

Calls:

ActivityPop

Search Entities	Search Fields	Additional Filter	Action
Contact	mobilephone.telephone1.telephone2.telephone3	statecode eq 0	✖ ⋮
Account	telephone1.telephone2.telephone3	statecode eq 0	✖ ⋮
Lead	mobilephone.telephone1.telephone2.address1_telephone1.address1_telephone2.address1_telephone3.address2_telephone1.address2_telephone2.address2_telephone3	statecode eq 0	✖ ⋮

Call Backs:

ActivityPop

Search Entities	Search Fields	Additional Filter	Action
Contact	mobilephone.telephone1.telephone2.telephone3	statecode eq 0	✖ ⋮
Account	telephone1.telephone2.telephone3	statecode eq 0	✖ ⋮
Lead	mobilephone.telephone1.telephone2.address1_telephone1.address1_telephone2.address1_telephone3.address2_telephone1.address2_telephone2.address2_telephone3	statecode eq 0	✖ ⋮

Using the configuration as shown above, the following capabilities are available:



- Interaction Types – Control the search by interaction type. Each interaction has a checkbox to disable a screen pop. Disabling the interaction, tells InteractionSync not to perform any screen pops for that specific interaction.

Note: By default, all the interactions are enabled.

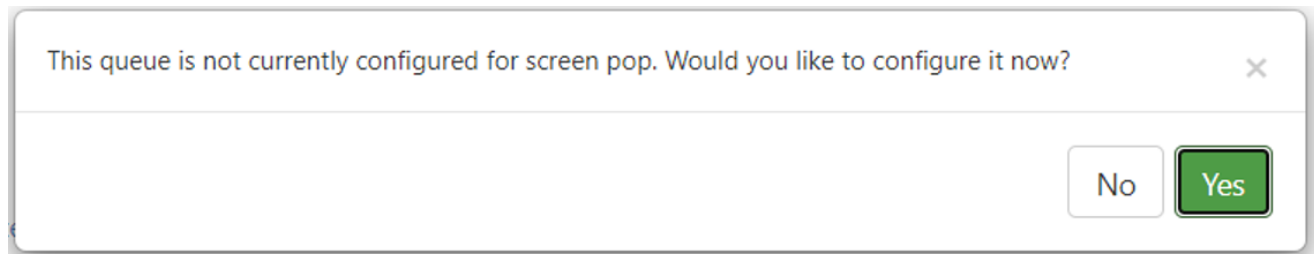
- ActivityPop – Click the setting for the activity pop to appear when an interaction is accepted.
- Search Entities – Add or remove standard or custom entities to be searched
- Search Fields – Control which fields are searched per entity type
- Additional Filter – Ability to filter which entities are included in the result. For instance, **statecode eq 0** will filter out inactive contacts. For more details on filter syntax, see <https://docs.microsoft.com/en-us/powerapps/developer/data-platform/webapi/query-data-web-api#filter-results>.

5.5.2 New queue configuration

A new queue can be configured within the InteractionSync configuration Screen Pop section.

Note: If the selected queue is already configured, you can skip the following configuration steps.

1. From the Screen Pop tab, navigate to **Select Queue**.
2. Select the queue you want to configure from the drop-down menu.
3. A screen pop appears asking to configure.
4. Click **Yes** to configure.



InteractionSync for PureCloud Testing 2

Result: A new queue is configured.

Once the queue is selected, the interaction-specific screen pop settings are revealed. Maximize the interactions to configure the settings.

+ Call Interactions

+ Callback Interactions

+ Chat Interactions

+ Email Interactions

+ Message Interactions

+ SMS Interactions

Setting	Description
Allow Activity Screenpop	Enable the setting for the activity screen pop to appear when an interaction is accepted. Click the toggle switch to enable.
Enable Screen pop for interactions	Enable the Screen pop feature for the interaction you want the screen pop to appear. Upon enabling, the screenpop settings are revealed. Click the toggle switch to enable.
Trigger	Screen pop appears based on the option selected. <ul style="list-style-type: none"> • Offer: Appears when the interaction is offered/alerted. • Connected: Appears when the interaction is connected.
Record Session Template (CIFv2)	Select the Record Session Template drop-down for the entity record to open upon accepting an incoming interaction.
Search Session Template (CIFv2)	Select the option from the Search Session Template drop-down for the search window to open upon accepting an incoming interaction.
No matching records	Action to execute when no matching records are found. The options are as follows: <ul style="list-style-type: none"> • Pop a new entity – Open a new entity. See “Open New Entity” and “Set Phone Number” settings for more control over this configuration. • Don’t pop screen – take no action when the interaction is delivered to the agent. • Open search page – Open the global search page using the search term (phone number, email address).
Open New Entity	Select the entity to open when no match is found. This allows different business units to control which entity should be opened. For instance, Customer Service may open a new Contact while Sales may open a new Lead.
Set Entity Attribute	Set the attribute of the new entity to which the phone number or email address is assigned.

Setting	Description
One matching record	Action to execute when one matching record is found. The options are as follows: <ul style="list-style-type: none"> • Don't pop screen - take no action when the interaction is delivered to the agent • Pop Detail page – open the entity detail form
Multiple matching records	Action to execute when multiple matching records are found. The options are as follows: <ul style="list-style-type: none"> • Don't pop screen - take no action when the interaction is delivered to the agent • Pop to search page – Open the global search page using the search term (phone number, email address)

Using the configuration as shown above, the following capabilities are available:

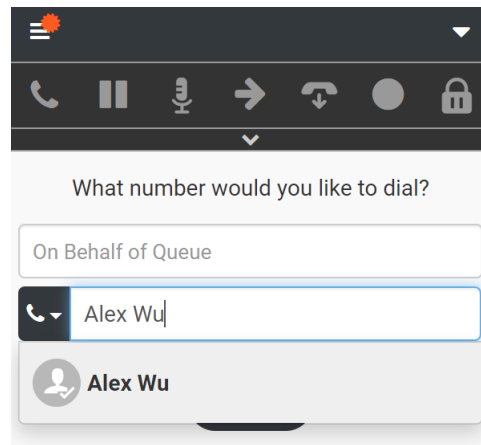
Search Entities	Search Fields	Additional Filter	Action	Add
Contact	mobilephone,telephone1,telephone2,telephone3	statecode eq 0	✖ ⋮	
Account	telephone1,telephone2,telephone3	statecode eq 0	✖ ⋮	
Lead	mobilephone,telephone1,telephone2,address1_telephone1,address1_telephone2,address1_telephone3,address2_telephone1,address2_telephone2,address2_telephone3	statecode eq 0	✖ ⋮	

- Search Entities – Add or remove standard or custom entities to be searched
- Search Fields – Control which fields are searched per entity type
- Additional Filter – Ability to filter which entities are included in the result. For instance, **statecode eq 0** will filter out inactive contacts. For more details on filter syntax, see <https://docs.microsoft.com/en-us/powerapps/developer/data-platform/webapi/query-data-web-api#filter-results>.

5.6 New Interaction tab

InteractionSync has the ability to place a New Interaction from within the softphone. In the New Interaction form, it can search and show the results from Dynamics entities. This configuration allows for control of which entities are searched, what fields are searched, what label is used to show in the result, and additional filters used to search the entity. This configuration is related to Transfer Search Targets setting. The Transfer Search Targets frameworkContacts must be checked to search Dynamics entities. If it is unchecked, this configuration is not used to search Dynamics.





Default New Interaction Searching

Add

Search Entities	Search Fields	Entity Label	Additional Filter	Action
User	fullname, homephone, mobilephone, address1_telephone1	fullname	address1_telephone1 ne null	X ...
Contact	telephone1, fullname, telephone2, mobilephone, telephone3	fullname	statuscode eq 0	X ...
Account	name, telephone1, telephone2, telephone3	name	statuscode eq 0	X ...

Override New Interaction Page

Override Page (not recommended)

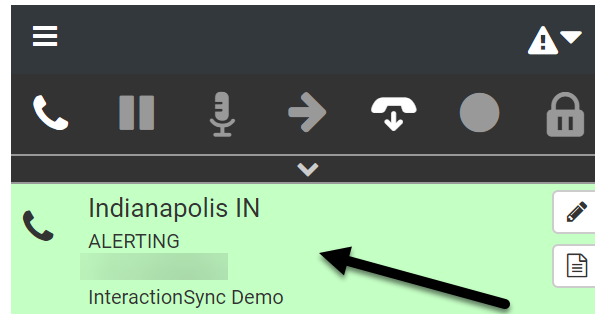
Using the configuration as shown above, the following capabilities are available:

- Search Entities – Add or remove standard or custom entities to be searched when initiating a new interaction.
- Search Fields – Control which fields are searched per entity type
- Entity Label – Entity label value to show in the new interaction search text box
- Additional Filter – Ability to filter which entities are included in the result. For instance, **statecode eq 0** will filter out inactive contacts. For more details on filter syntax, see <https://docs.microsoft.com/en-us/powerapps/developer/data-platform/webapi/query-data-web-api#filter-results>.
- Override Page – This checkbox allows the ability to override the make call scenario within the softphone such that Dynamics can override values like queue, custom attributes, caller id and name. This is rare to need this capability. For more information, contact Support for details.

5.7 Interaction details tab

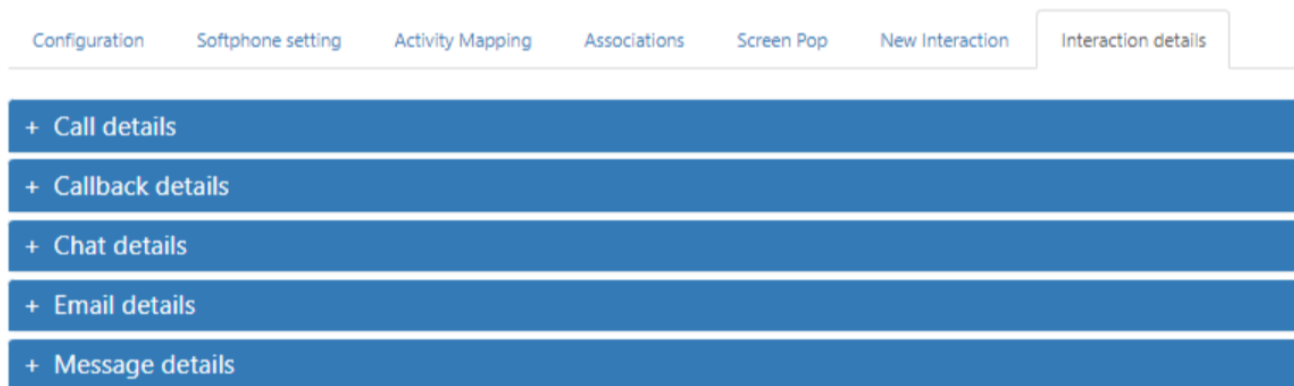
Within InteractionSync main view, Interactions, there are numerous labels describing each interaction including queue, state, remote number, and remote name. In this release, these labels can be

controlled by interaction type, the order the values are shown, and what attributes to be used. For instance, you could show information obtained within Architect like Customer Level (Gold, Silver), Product Interest, Language, etc. These are just a few examples and can be set specific to each implementation.



In the Interaction details configuration tab contains numerous sections for each interaction types. Within each section, use the appropriate buttons to add new attributes to the list. The *Selected Attributes* list drives which attributes will be used for the respective interaction type.

Note: Overriding the attributes is not required. Leaving an empty list will use the defaults.



5.7.1 Attribute options

By default, interactions in the client display certain information in a particular order based on the type of interaction. You can change the default attributes used or the default order of this displayed information.

After setting up a call center for the first time or upgrading to a new version of the managed package, customize the interaction details.

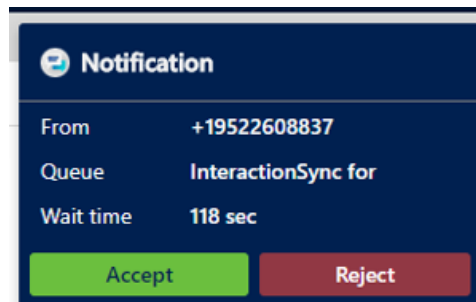
Below is list of the most common options by interaction type. For a comprehensive list, see <https://help.mypurecloud.com/articles/synchronize-interaction-attributes-with-salesforce-activity-records/>.

Note: While there is no limit of how many attributes can be set, a conversation object that includes such participant and segment data must be under 2 MB.

Interaction attribute	Interaction type	Description
Call.Ani	Call, callback	Phone number of the caller.
Call.CalledNumber	Call, callback	Phone number dialed (DNIS or SIP addresses for queues).
Call.ConversationId	All*	Interaction ID.
Call.QueueName	All*	Name of the queue that the interaction routes to or from.
Call.RemoteName	All*	Remote name for the active interaction. Note: For SMS messages, this attribute returns the display address for the active interaction.
Call.State	All*	State of the interaction (for example, ALERTING, CONNECTED, DISCONNECTED, HELD).
Email.Subject	Email	Subject line in the email.
Participant.CustomFieldName	Call, callback, email, ACD voicemail	Custom field name that is assigned using Set Participant Data in an Architect flow. See https://help.my-purecloud.com/articles/set-participant-data-action/ .
Message.Username	Chat	Custom field name that is used in the chat widget.
Salesforce.CallTimeElapsed	All*	Time that indicates how long the interaction has been connected, from the time of connection to disconnection or wrap-up completion.
Salesforce.DisplayAddress	Call, callback, outbound dialing, chat, email	Remote address of the active interaction: <ul style="list-style-type: none"> • phone number for call, callback, outbound dialing, message, and ACD voicemail interactions. • email address for chat and email interactions.

5.8 Notifications tab

Incoming interaction alerts are set up and customized by mapping a Notification Field with an Interaction Attribute.



Note: Notification mapping works with CIFv2 supported apps such as “Omni-Channel for Customer Service” or “Customer Service workspace”.

The screenshot shows the 'Notifications' tab in the Genesys Cloud Administrator. At the top, there is a dropdown menu for 'OmniApp (V2)' and a 'Save' button. Below the navigation tabs (Configuration, Softphone setting, Activity Mapping, Associations, Screen Pop, New Interaction, Interaction details, Notifications), there is a table with two columns: 'Notification Field' and 'Interaction Attribute'. The table contains three rows:

Notification Field	Interaction Attribute		
from	searchString	X	...
queueName	interaction.queueName	X	...
emailAddress	interaction.attributes.is_emailaddress	X	...

To the right of the table, a 'Define new notification' dialog box is open. It has two input fields: 'Notification Field' and 'Interaction Attribute', and an 'Add' button at the bottom.

Note: New parameters can be added only in an unmanaged “InteractionSyncforGenesysCloudTemplates” solution.

1. Locate the value for the attribute name from the notification template.

Notification Fields			📄 Add Existing Notificati...	🔄 Refresh	⋮
✓ Name ↑ ↓	Title ↓	Value ↓			
Email Address	Email Address	{emailAddress}			
From	From	{from}			
Queue	Queue	{queueName}			

2. Within the Notifications tab, locate the **Define new notification** box.
3. In the **Notification Field**, enter the value of the attribute.
4. In the **Interaction Attribute**, enter the value of the attribute in the format `interaction.<attributevalue>`. E.g., `interaction.queueName`
5. Click **Add**.
6. Click **Save**.

5.8.1 Available interaction attributes

Note: The output of the attribute may vary based on the interaction type.

- connectedTime
- endTime
- phone
- name
- isConnected
- isDisconnected
- isDone

- state
- attributes
- isCallback
- isDialer
- isChat
- isEmail
- isMessage
- messageType
- isVoicemail
- isSharingScreen
- isCoBrowsing
- remoteName
- recordingState
- displayAddress
- queueName
- ani
- calledNumber
- interactionDurationSeconds
- totalivrDurationSeconds
- totalAcadDurationSeconds
- disposition
- dispositionDurationSeconds
- direction
- flagged
- isInternal
- startTime
- id

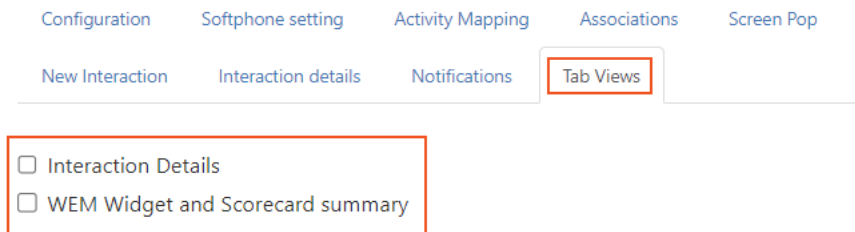
Note: To use a custom attribute (participant attribute), enter in format:
`interaction.attributes.<customattribute value>`

E.g., `interaction.attributes.color`

5.9 Tab Views tab

Admins can configure the viewable tabs from the configuration screen. The available settings in the Tab Views section include Interaction Details, and WEM Widget and Scorecard Summary. Enable these settings to display them as tabs on the softphone.

Note: By default, the settings are disabled.



Important: Agents must have Genesys Gamification permissions to view the WEM data in the ISync softphone tab, even though the admins have enabled the WEM Widget and Scorecard summary setting on the configuration page. See <https://help.mypurecloud.com/articles/activate-gamification-for-your-organization/>.

Once the Genesys Gamification settings are enabled, assign an agent to Default Profile or create a New Profile to assign.

To assign the agent to Default Profile:

1. Log in to **Genesys Cloud**.
2. Navigate to **Admin**.
3. Go to **Performance & Engagement** and click **Gamification Profiles**.
4. Select the **Default Profile**.
5. Go to **Members tab**.
6. Click **Add Members**.
7. Search for the agent name and click **Add to List**.
8. Click **Assign Agent**.

Result: Agent is assigned to Default Profile.

If you want to create a new profile and then assign the agent, see <https://help.mypurecloud.com/articles/configure-gamification-profile-details/>.

6 Configure InteractionSync for the Unified Interface

Dynamics 365 Online released a new user interface named “Unified Interface” which is now the default for any new deployments. To help partners integrate with Unified Interface, Microsoft developed a new API called Channel Integration Framework (CIF).

See <https://docs.microsoft.com/en-us/dynamics365/customer-service/channel-integration-framework/channel-integration-framework>.

This API provides a static area within Unified Interface for a “softphone” to be embedded. CIF has two versions of the API:

- [CIF v1](#) – Initial version which supports Customer Service Hub, Sales Hub, and any model-driven App where the softphone area is on the right side.
- [CIF v2](#) – Latest version which added support for Customer Service Workspace and Omni-Channel for Customer Service.

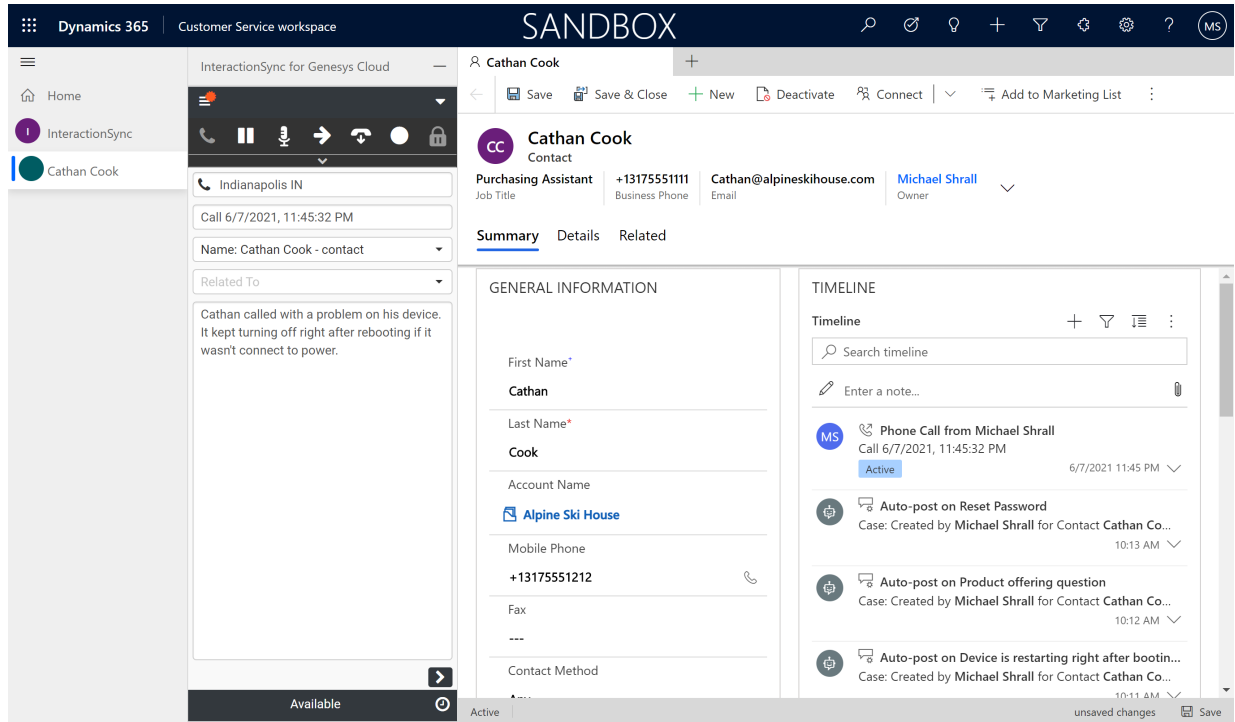
Note: Microsoft Channel Integration Framework is not available for Dynamics 365 On Prem.

Figure 1 - Customer Service Hub with InteractionSync Softphone on right (CIF v1)

The screenshot displays the Dynamics 365 Customer Service Hub interface for a contact named Cathan Cook. The interface is divided into several sections:

- Header:** Shows the Dynamics 365 logo, navigation tabs (Customer Service Hub, Service, Contacts), and the contact name "Cathan Cook" with his job title "Purchasing Assistant" and email "Cathan@alpineskihouse.com".
- Left Navigation Panel:** Includes "Home", "Recent", "Pinned", "My Work", "Dashboards", "Activities", "Customers", "Accounts", "Contacts", "Social Profiles", "Service", "Cases", "Queues", and "Knowledge Articles".
- Summary Tab:** Contains "GENERAL INFORMATION" (First Name: Cathan, Last Name: Cook, Account Name: Alpine Ski House, Mobile Phone: +13175555555), "TIMELINE" (recent activities like "Phone Call from Mi...", "Auto-post on wall D...", "Auto-post on wall P...", "Auto-post on wall R...", "Auto-post on wall C..."), and "RELATED" (Recent Cases like "Device is turning off right after...", "Product offering question", "Reset password").
- Right Panel (InteractionSync for PureCloud):** An embedded softphone interface showing a call log for "Indianapolis IN" on "1/20/2020, 3:04:42 PM". It includes a "Name" field with "Cathan Cook - contact" and a "Related To" field with "Device is turning off right after booting - in". A text area below contains the message: "Cathan called with a problem with his device. It kept turning offer right after rebooting it if it wasn't connected to the power." At the bottom, it shows "On Queue" and a "Save" button.

Figure 2 - Customer Service Workspace with InteractionSync Softphone on left (CIF v2)



6.1 Install Channel Integration Framework

Channel Integration Framework is available on Microsoft AppSource. An administrator can download the framework to a Dynamics environment through AppSource installation. There is only one download for both CIF v1 and CIF v2, the application type will dictate which version is used.

1. Log into Dynamics as an administrator.
2. Click **Get More Apps** under Dynamics 365 menu in the header.
3. Search for **Channel Integration Framework**.
4. Click **Get it now** in the Dynamics 365 Channel Integration Framework tile.
5. Accept terms and conditions to install.

After the framework is installed, follow the steps below based on the type of Dynamics model-driven app being used.

6.1.1 Set up CIF v1 option

For Customer Service Hub, Sales Hub, and any model-driven app where the softphone area is on the right side

For Customer Service Hub, Sales Hub, and single page Model-driven apps, InteractionSync can be shown on the right side of the application. To set this up, the Channel Integration Framework

application is used to create a Channel Provider to point to InteractionSync.

Follow the steps below to configure the Channel Provider.

1. Click **Channel Integration Framework** app under Dynamics 365 menu in the header. The *Active Channel Providers* view is displayed.
2. Click **New** in view ribbon to create a new channel provider pointing to InteractionSync.
3. Configure the details:

Field Name	Value
Name	InteractionSync for Genesys Cloud
Label	InteractionSync for Genesys Cloud
Channel URL	https://interactionsync.avtexcloud.com
Enable Outbound Communication	Yes
Channel Order	1
API Version	1.0
Trusted Domain	<i>leave blank</i>
Custom Parameters	<i>leave blank unless separate configurations required. See Custom Parameters below.</i>
Select Unified Interface Apps for the Channel	Select which unified interface apps should show InteractionSync soft-phone.
Select the Roles for the Channel	Select which roles in the organization should show InteractionSync soft-phone. See Permissions below.

4. Click **Save**.

Custom Parameters

Custom Parameters can be used to create separate configurations by business units or groups of users. The Custom Parameters value maps to a Configuration profile within the InteractionSync managed solution. The purpose for this would allow for different configurations for different organizations. Custom Parameters is specifically tied to the name of the Configuration profile such that one Configuration profile matches each Channel Provider.

- If Custom Parameters is left blank, the Default Configuration profile will be utilized for this Channel Provider.
- If a Custom Parameters value is set, go to the InteractionSync managed solution configuration page. When it loads, it will automatically create new configuration profiles in the drop-down list which match the string specified in the custom parameters for the Channel Profile.

Permissions

The managed solution deploys a role, *InteractionSync for Genesys Cloud User*, which can be used to assign to the Channel Provider along with users who should use the application.

To be able to utilize InteractionSync in Dynamics, the desired user must belong to a role that has the following permissions allowed:

1. Need to be able to read the InteractionSync for Genesys Cloud Config Entity custom entity (isgc_interactionsynconfig).
2. Need to be able to read the Note entity (our config custom entity is a subtype of the note entity).
3. Needs to be able to query (read) basic 'people' entity types (contact, lead, account).
4. Needs to be able to create/update the activity entity (as well as subtypes).

The screenshot displays the Dynamics 365 interface for configuring a channel provider. The main configuration area is titled 'InteractionSync Channel Provider' and 'Channel Provider Configuration'. The configuration details are as follows:

- Name***: InteractionSync for Genesys Cloud
- Label***: InteractionSync for Genesys Cloud
- Channel URL***: https://interactionsync.avtexcloud.com
- Enable Outbound Communication***: Yes
- Channel Order***: 1
- API Version**: 1.0
- Trusted Domain**: ---
- Custom Parameters**: ---

On the right side, there are two selection panels:

- Select Unified Interface Apps for the Channel**: Shows 'Customer Service Hub' and 'Sales Hub' selected.
- Select the Roles for the Channel**: Shows 'InteractionSync for Genesys Cloud User' selected.

6.1.2 Set up CIF v2 option

For Customer Service Workspace & Omni-Channel for Customer Service

Customer Service Workspace and Omni-Channel for Customer service are new UI experiences for handling multiple interactions or sessions at one time within one browser page. InteractionSync supports this through CIF v2 support. This section covers the necessary steps to configure InteractionSync Channel within these multi-session application experiences.

Import InteractionSync app templates

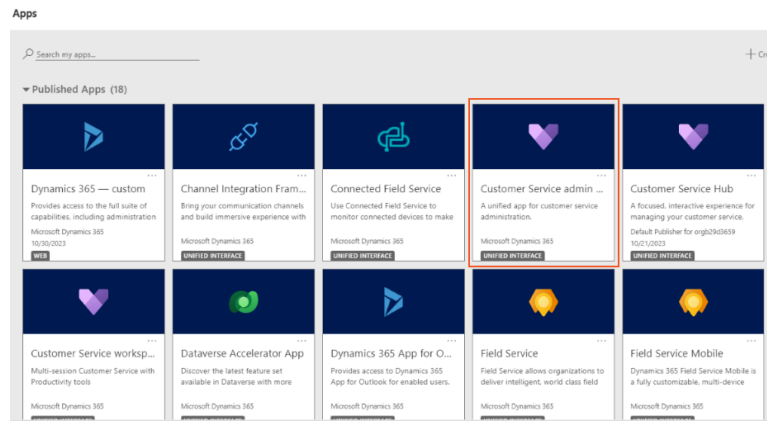
1. As a Microsoft Dynamics admin user, navigate to **Settings > Solutions**.
2. Click **Import**.

3. Click **Choose File** and locate `InteractionSyncforGenesysCloudTemplates.zip`, then select **Next**.
4. Click **Next** on the following screen.
5. On the **Post Import Actions** dialog, ensure the check mark is checked then select **Import**.
6. Once complete, you should see a screen that shows the status of the import.
7. Click **Close**.

Create app Profile

Dynamics 365 uses App Profiles to configure how the session apps behave. To manage the configuration, Dynamics CRM is used.

1. Navigate to **Dynamics CRM** environment.
2. From the app listing view, select **Customer Service admin center**.

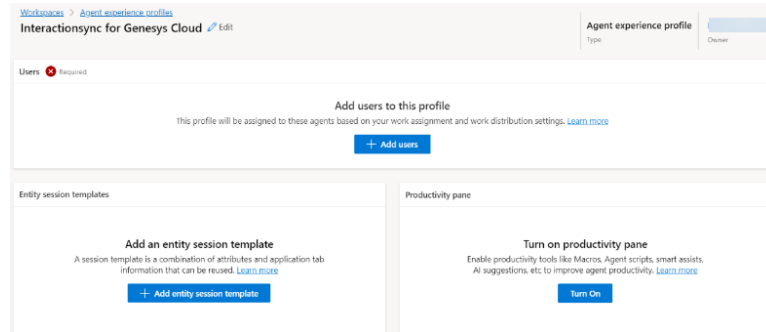


3. Select **Workspaces** from the **Agent experience** section.
4. From the Agent experience profiles, click **Manage**.
5. Click **New**, enter the values and click **Create**.

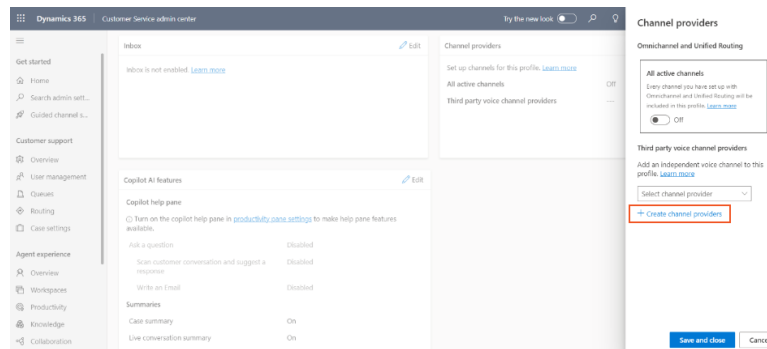
Field Name	Value
Name	InteractionSync for Genesys Cloud
Unique Name	isgc_interactionsync

Result: App profile is created.

6. Once App profile page is created, **Add users to this profile** page is displayed.



7. Click **Add users** to navigate to the App Profile user assignment.
8. Select the desired user from the list and click **Add** to view the Agent experience profiles page.
9. From the Agent experience profiles page, navigate to the **Channel providers tab** and click **Edit**. Click **Create channel providers** link to create new channel provider for the Unified Interface.



10. Fill out the channel provider settings as follows:

Field Name	Value
Name	InteractionSync for Genesys Cloud
Unique Name	isgc_interactionsync
Label	InteractionSync for Genesys Cloud
Channel URL	https://interactionsync.avtexcloud.com
Enable Out Bound	Yes
Channel Order	1
Api Version	2
Custom Parameters	<i>leave blank unless separate configurations required. See Create app Profile.</i>

New Channel Integration Framework v2.0 Provider

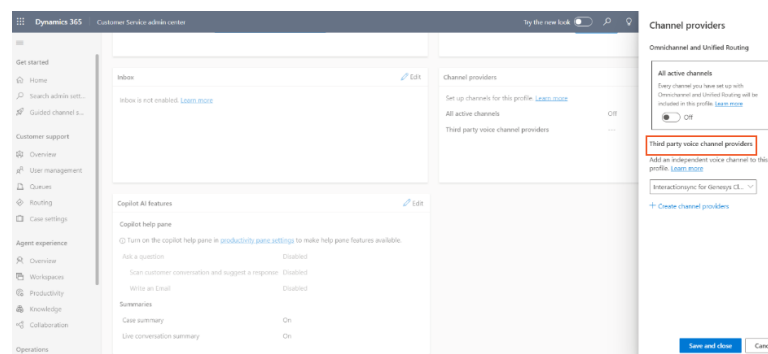
General

Name	InteractionSync for Genesys Cloud
Unique Name	isgc_interactionsync
Label	InteractionSync for Genesys Cloud
Channel URL	https://interactionsync.avtcloud.com
Enable Out Bound	Yes
Channel Order	1
Api Version	2
Trusted Domain	---
Custom Parameters	---
Enable Analytics	No

11. Click **Save & Close**.

Result: Channel provider is created.

12. Once returned to the App profile page, navigate to Channel provider tab and click **Edit**. In the **Third party voice channel providers** section, search and select the channel provider created.



13. Click **Save & Close**.

Result: CIFV2 setup is successfully completed.

6.2 Auto-associate new entity on save

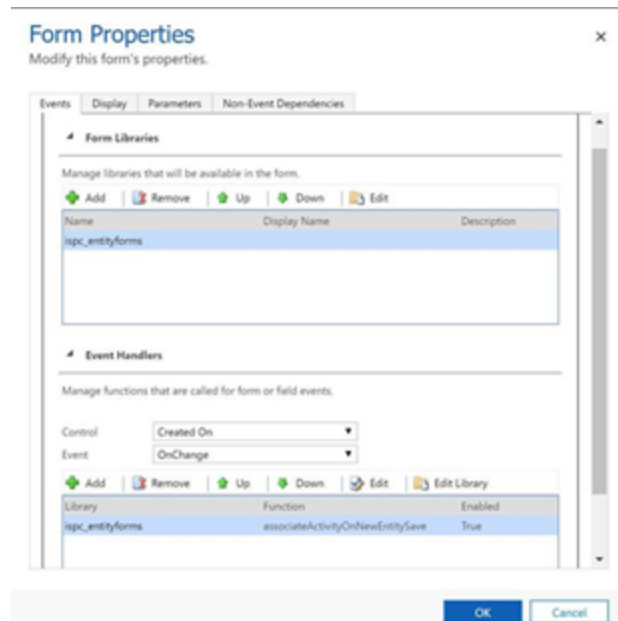
Important: Dynamics Channel Integration Framework does not send the necessary events to InteractionSync when a new entity is created and saved causing the activity created to not be automatically associated.

InteractionSync provides a workaround which issues the necessary event when the Entity form is saved. This workaround requires hooking an event on all entity forms that require association.

Note: The example below is for the Contact form only.

1. Open the desired entity form to monitor for new entity saved.
2. On the form, if the "Created On" field is not present on the form, add it to the form. The field does not though need to be visible.
3. Open entity form properties.
4. Add Form Library: isgc_entityforms
5. Add new Event handler for *Created On* with the Event *OnChange*.
6. Set the following parameters:

Field Name	Value
Library	isgc_entityforms
Function	associateActivityOnNewEntitySave
Pass execution context	enabled (True)



7 Screen pop configuration

Screen pop is a mechanism that automatically opens a specific page in Dynamics using existing information or data attached to an incoming interaction. Screen pops assist the agent using Genesys Cloud and Dynamics by "popping" the related page automatically so they do not have to manually search for the page in Dynamics.

- Out-of-the-box screen pop functionality is provided so there is no extra configuration necessary to get screen pops to work after you have InteractionSync installed.
- Custom screen pops can also be configured by applying attributes, or 'participant data' to the interaction.

7.1 Default data by media type

The default screen pop behavior of InteractionSync takes an identifying piece of information from inbound interactions and use it to query Dynamics.

Media type	Default search value
Phone call	ANI/CLI
SMS	ANI/CLI
Line	ANI/CLI
WhatsApp	ANI/CLI
Callback	ANI of phone that made the original call
Email	'From' email address
Web chat	IS_EmailAddress value set when the chat is created from the website. See Web chat
Facebook	Username/Handle
Twitter	Username/Handle

Note: To override the search value used on any given interaction, set IS_PopSearch to desired search value.

7.2 Web chat

InteractionSync looks for an email address of the person chatting in to be able to search in Dynamics for screen pop. This means that in your website configuration for initiating a chat, either through the Genesys Cloud API or through the Genesys Cloud chat widget (<https://developer.mypurecloud.com/api/webchat/>), must provide a specific attribute: IS_EmailAddress.

InteractionSync uses the IS_EmailAddress value to search for matching Dynamics entities to execute the pop. Here's a web chat creation example function:

```

ININ.webchat.create(chatConfig)
  .then(function (webchat) {
    chatBtn.onclick = function () {
      webchat.getConfig().setData({
        firstName: 'Brienne',
        lastName: 'Wexler',
        IS_EmailAddress: 'bwexler@example.com'
      });
      webchat.renderPopup({ containerEl: 'chat-container' });
    };
  });
}

```

7.3 Specific Dynamics entity

One alternative to popping based on a basic search, InteractionSync can be driven to pop a specific entity. For example, within Genesys Cloud Architect, a Dynamics data action is used to query a specific entity identifier (perhaps a case). InteractionSync can pop this specific entity on interaction delivery. To drive this, InteractionSync looks for two interaction attributes. Assigning these values for calls in Architect is done using the 'Set Participant Data'.

- `IS_EntityType` – Dynamics entity name to pop (e.g., contact, lead, incident, opportunity, [customentityname])
- `IS_EntityId` – Dynamics entity identifier. (e.g., 85fc1b5c-be69-e811-8121-5065f38a4b21)

To assign these values for web chats, first reference the [Web chat](#) section above. In the call to `webchat.getConfig().setData()` you'll add the attributes to the data you're wanting to set. So an updated version of that method call would look like this:

```
webchat.getConfig().setData({
  ...
  IS_EntityType: 'contact',
  IS_EntityId: '837fdac0-a95a-e811-811f-5065f38a0a41'
  ...
})
```

7.4 New entity

When using Architect data actions to query Dynamics, there are times no results are found, and the user will need to create a specific entity when handling the interaction. `InteractionSync` can help initiate this process by opening a new entity prefilling values within the entity. To pop and prefill a new entity using these attributes, configure the three attributes as follows:

- `IS_EntityType`: Dynamics entity name to pop (e.g., contact, lead, incident, opportunity, [custom entity name])

Note: `InteractionSync` creates activities automatically for every interaction handled. To pop the activity created as the desire screen pop, set `IS_EntityType` to `activity`. For inbound and outbound calls, activities are not created until the interaction is connected so the activity will not be popped until the interaction is connected.

- `IS_EntityId`: NEW in all uppercase. NEW tells `InteractionSync` to load a new entity instead of a specific entity.
- `IS_EntityValues` (optional): This will be a double pipe-delimited string of field/value pairs to populate on the new entity.

For example, to pop a new contact with `firstname`, `lastname`, `fullname`, and `telephone1` fields for the new contact, set your values as follows:

- `IS_EntityType`: contact
- `IS_EntityId`: NEW
- `IS_EntityValues`: fullname=John Doe||firstname=John||lastname=Doe||telephone1=+13125551212

Note: To set Lookup value types, it will require setting numerous fields. The example below sets the Case customer id using retrieved ContactID, FirstName, and LastName from Dynamics data dip.

- IS_EntityType: contact
- IS_EntityId: NEW
- IS_EntityValues: "customerid="+ Task.ContactID,"||customeridname=" + Task.FirstName+ " "+Task.LastName,"||customeridtype=contact")
- Multiple field types are supported by this approach. There are a couple which require special approach:
 - Option Set – it should be set to the value property
- InteractionSync will match the name in IS_EntityValues to the Dynamics field name and prefill the field with the value after the '=' sign. So in this example, a new Contact screen will open with the values prepopulated.

Note: Keep in mind InteractionSync is only opening the new entity screen and prefilling the form. Nothing has been saved yet. To save the information that was popped, the agent will need to click the save icon for the record in the lower right-hand corner.

7.5 Dynamics global search

When using Dynamics data actions to perform a query, often the search could return multiple results. Since Dynamics can only pop one screen, a screen pop can be configured to execute a Global Search. Prior to the interaction routing, set the attribute, IS_SearchValue, to deliver to the Dynamics Global search using the value of this attribute.

7.6 Using Dynamics openForm API

Dynamics provides an ability to screen pop using the openForm API (<https://docs.microsoft.com/en-us/powerapps/developer/model-driven-apps/clientapi/reference/xrm-navigation/openform>). The openForm API provides extensive control over how the page is to be rendered and is controlled by two parameters which can be sent via attributes. Both should be sent in object form (JSON format).

- IS_PopFormOptions – Required form options to be sent into the openForm API.
- IS_PopFormParameters – Optional form parameter to be sent into the openForm API. This parameter is not required to utilize the openForm API.

7.7 Using Dynamics entity query

Dynamics provides the ability to search and open Dynamics entities, [searchAndOpenRecords](#). With this API, a specific entity can be queried. The screen pop will execute based on *Screen Pop tab* in the configuration.

- **IS_PopQueryEntity** – Entity to search
- **IS_PopQueryParameters** – OData system query options, **\$select** and **\$expand**, to retrieve your data. See *Dynamics documentation* for more details. Based on the number of matching entities will drive what screen pop is executed.
 - **One match** – Opens the detail entity page
 - **Multiple matches** – Executes the Global search using the search string parameter below.
 - **No match** – Opens the Entity defined in pop query entity defined above.

Example: `$select=name&$expand=primarycontactid($select=contactid,fullname)`

- **IS_PopQuerySearchString** – If the query finds no matches, this search string value will be sent to the Dynamics Global Search.

Example: `IS_PopQueryParameter $select=name&$expand=primarycontactid($select=contactid,fullname)`

7.8 New screen

To screen pop to a new screen or page instead of popping to the existing Dynamics page, set `IS_PopNewPage` to 1.

7.9 Disable pop

On an interaction-by-interaction basis, a screen pop can be disabled easily by setting `IS_NoPop` to 1. This tells InteractionSync not to perform any screen pops for the specific interaction.

7.10 Screen pop & phone number formatting

One of the biggest challenges for Dynamics organizations is the formatting of phone numbers. Dynamics stores phone numbers as a string. As such, searching phone number values with various formatting options for the same number and various country formats make it near impossible to cover every variation to enable consistent search results across all InteractionSync customers. Currently to solve this, InteractionSync has a consistent approach to searching phone numbers while allowing customers to search based on their own formatting situation. Both methods are described in this document.

Genesys Cloud has standardized on the E.164 number formatting as it has become the accepted international standard for number formats. The number is prefaced by a 'tel:' behind the scenes to indicate

the correct protocol when being used by web-based communications products. For example, if an incoming call in the US had a phone number of (302) 232-5555, then Genesys Cloud would present that number as **tel:+13022325555**. A number from the UK that has the phone number of 020 7123 7805 would be reformatted by Genesys Cloud to **tel:+442071237800**.

While E.164 is the international standardized format, it doesn't mean the phone numbers in all systems are formatted that way. Often, new leads are imported into Dynamics 365 from a spreadsheet or other data source which didn't to 'clean' the numbers on import.

The first challenge is to determine there is a standard phone number format throughout your Dynamics instance. Is there a predominant format for numbers inside of your Dynamics instance even if it's not the E.164 format? If yes, then this document will help you search effectively for screen popping your contacts/accounts/leads with InteractionSync. If you have multiple different formats because no standardization has occurred within your Dynamics instance, then you'd be best served to first consider taking steps standardize your numbers. [We'd be glad to help with that!](#) But you'll also potentially be able to use the following steps as well, or combinations of them to achieve good results.

7.10.1 Default screen pop behavior

When a phone call is presented to a user, InteractionSync uses the ANI/CLI to drive screen pop based on matching to numerous entities.

Example ANI presented by Genesys Cloud: tel:+13172325555

1. The 'tel:' portion of the number is removed, leaving +13172325555.
2. InteractionSync checks all Contacts in Dynamics to see if there is a match with that phone number. The fields that are checked within Contacts are:
 - a. telephone1 (Business Phone)
 - b. telephone2 (Home Phone)
 - c. telephone3 (Telephone 3)
 - d. mobilePhone (Mobile Phone)
3. If there is more than 1 match, InteractionSync will pass the phone number to Dynamics Global search. If there is no match or only 1 match, the query continues to search Accounts.
4. InteractionSync next checks all Accounts for a match using the phone number. The fields that are checked within Accounts are:
 - a. telephone1 (Main Phone)
 - b. telephone2 (Other Phone)
 - c. telephone3 (Telephone 3)
5. In the same way as above, if there is more than 1 match, InteractionSync will pass the query on to the global search. If there is a match and there was already a single match in Contacts, the query will

be passed on to the global search since there is collectively two matches between accounts and contacts.

6. InteractionSync's final check is in Dynamics Leads for a phone number match on the following fields:
 - a. telephone1 (Business Phone)
 - b. telephone2 (Home Phone)
 - c. telephone3 (Other Phone)
 - d. mobilePhone (Mobile Phone)
 - e. address1_telephone1 (Address 1: Telephone 1)
 - f. address1_telephone2 (Address 1: Telephone 2)
 - g. address1_telephone3 (Address 1: Telephone 3)
 - h. address2_telephone1 (Address 2: Telephone 1)
 - i. address2_telephone2 (Address 2: Telephone 2)
 - j. address2_telephone3 (Address 2: Telephone 3)
7. Same behavior as before on executing global search if multiple matches are found.
8. If nothing is found while searching, then the 'New Contact' screen is popped for the agent.

This works well if the numbers are stored in Dynamics in this format: +13172325555. What about these formats, 3172325555 or (317) 232-5555? Herein lies the dilemma. While they are effectively the same number, searching strings require a direct match. There are no parentheses, dashes, or plus signs in the phone number.

7.10.2 Prerequisites

To implement a workaround strategy for this, let's introduce the components necessary to achieve our goal. The following is not intended to be a deep dive into either of these components, only to give an understanding of the skill set required for a successful implementation.

Architect

Architect is a Genesys Cloud application responsible for configuring your inbound call flows. It not only plays prompts and allows callers to navigate menus, but also can perform lookups into various data sources and apply logic and actions based on certain conditions. To build data actions to access Dynamics data, Architect, Flows, and Data Action access are all required. For details on how to work with inbound flows, see <https://help.mypurecloud.com/articles/work-with-inbound-call-flows/>.

Genesys Cloud Dynamics 365 data actions

Data actions are tools that are used within Architect to communicate with third-party APIs (ex: Dynamics 365 web API). With the standard Dynamics 365 static data actions available with Genesys Cloud, there are two data actions to perform searches. The two included we'll be using are:


- Get Contact by Phone Number
- Get Account by Phone Number

Both actions allow you to pass in a formatted phone number into Dynamics to see if there are any matches. To get started enabling the Dynamics 365 data actions for your Genesys Cloud instance, use the following Genesys Cloud resources. Pay close attention to the permissions needed to install and execute the data actions.

- Genesys Cloud Dynamics 365 Data action: <https://help.mypurecloud.com/articles/about-microsoft-dynamics-365-data-actions-integration/>
- Register the Microsoft Dynamics 365 data actions integration in Azure Active Directory: <https://help.mypurecloud.com/articles/register-microsoft-dynamics-365-data-actions-integration-azure-active-directory/>

7.10.3 Example 1: Phone number format is (317) 232-5555

InteractionSync needs this phone number formatted as +13172325555, but in Dynamics it is stored as (317) 232-5555. How do I search for it using its Dynamics format?

1. Create a Reusable Task in Architect to do searching in Dynamics. Once that Task is created, we can reuse it within call flow.
2. Assuming the Microsoft Dynamics 365 Data Actions are deployed within Genesys Cloud, within the Call Data Action will list the actions.
3. In the toolbox on the left-hand side, expand the *Data* container, select Call Data Action, and drag it into the task.
4. On the right, choose the category Microsoft Dynamics 365 Data Actions.
5. In the Data Action drop-down, select *Get Contact by Phone Number*.
6. Architect displays the inputs and outputs of the action which includes the phone number to search and variable to store the results when a contact is found
7. Given the need to format the ANI/CLI when executing the query, the expression editor is used to format the phone number. Click 
8. Create an expression combining the text elements (parenthesis and dash) and the numbers needed from Call.Ani.

9. Next, we want to add the first 3 numbers we need in Call.Ani to place inside the parenthesis. To accomplish this, we'll need to use a built-in function to tell Architect which characters to grab out of Call.Ani. Enter the following expression to convert tel:+xxxxxxxxxx stored in Call.Ani into this format, (xxx) xxx-xxxx.

```
"(" + Substring(Call.Ani, 6, 3) + ") " + Substring(Call.Ani, 9, 3) + "-" + Substring(Call.Ani, 12, 4)
```

10. Click Close button to continue.

11. Under 'Success Outputs' are results from the query. Change the dropdown for *contactid* from No Value to Variable, with the name *ContactId*. Architect will change the variable name to *Task.ContactId*. InteractionSync uses the contactid output to drive screen pop.

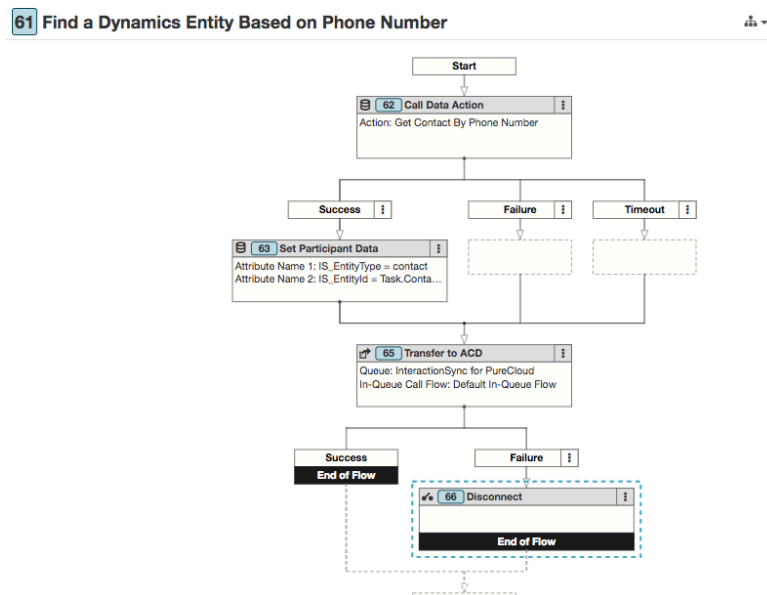
12. Next the ContactId must be set as Participant data for InteractionSync to drive the screen pop.

13. Add a *Set Participant Data* tool under the Success path of Call Data Action.

14. Two attributes are required to pop the Contact in InteractionSync.

- In Attribute Name 1 box, enter *IS_EntityType*. Assign value to *contact*.
- Select the *Add attribute to set* button in the work pane
- For Attribute Name 2 enter *IS_EntityId*. Change Literal to Expression, then type *Task.ContactId*

15. Complete the flow as needed including Transfer to ACD to deliver the call to the agent.



16. Upon testing, I see that I can pop a contact in my Dynamics instance with the given phone number format.

7.10.4 Example 2: Phone number format is 020 7123 7805

Phone numbers are stored in a regional format with extra characters that may not be included when converted to an E.164 format. InteractionSync needs this phone number formatted as tel:+442071237805, but in Dynamics it is stored as 020 7123 7805. The key differences are that we have the addition of the United Kingdom country code (+44) as well as no leading zero on the London area code (020). The other difference is that the number is stored in Dynamics with the spacing above which impacts for the formatting. Below is the Architect Expression to accomplish this format:

```
"0" + Substring(Call.Ani, 7, 2) + " " + Substring(Call.Ani, 9, 4) + " " + Substring(Call.Ani, 13, 4)
```

7.10.5 Summary

The main challenge with screen popping is phone number formats. In a perfect world, telephone numbers around the world would be in a format known to everyone and would be simple to search. Unfortunately, various countries, regions, and organizations format numbers differently and it's difficult to control how numbers get stored, imported, and exported from various data systems.

Out-of-the-box, InteractionSync will do searching that will cover E.164 formatted numbers, which from our perspective is the best practice to future-proof the product. Since all numbers aren't standardized in E.164, using this approach allows for differing formats.

The best results of searching phone numbers that aren't E.164 formatted is to ensure some standardization of format. If the format is known, Architect can be used to do searches effectively without having to reformat every number in Dynamics.

8 Miscellaneous options

InteractionSync has numerous capabilities which aren't controlled through configuration. In this section, numerous topics will be covered along with giving additional control in managing the solution.

8.1 Modify default activity creation

InteractionSync automatically creates activities for each interaction handled. There may be situations where InteractionSync should not create a new activity.

8.1.1 Update existing activity

Instead of creating a new activity, update an existing one.

For example: a phone activity which was created as an automated workflow which is then passed to InteractionSync to route to a user as a callback. To activate this capability, set a participant attribute `IS_ActivityId` with the Activity GUID prior to the interaction delivering to the agent. For non-standard activity types, in addition to the `ActivityId`, the activity entity type name and plural value need to be set:

- `IS_ActivityId` – Activity GUID reference number
- `IS_ActivityType` – Activity type name (e.g., appointment)
- `IS_ActivityTypePlural` – Activity type plural name (e.g., appointments)

Note: Close Activities on Event softphone setting must be set to **Do Not Close** to update the existing activity.

8.1.2 Disable activity creation

To disable activity creation for a specific interaction, set `IS_ActivityID` attribute to `NONE`.

8.2 Prefill *Activity To/From* when popping *Regarding* entity

When popping Case or Opportunity, the Activity automatically sets the *Regarding* field to the Case or Opportunity Id but the *From* may not be automatically set to the primary contact on those entities.

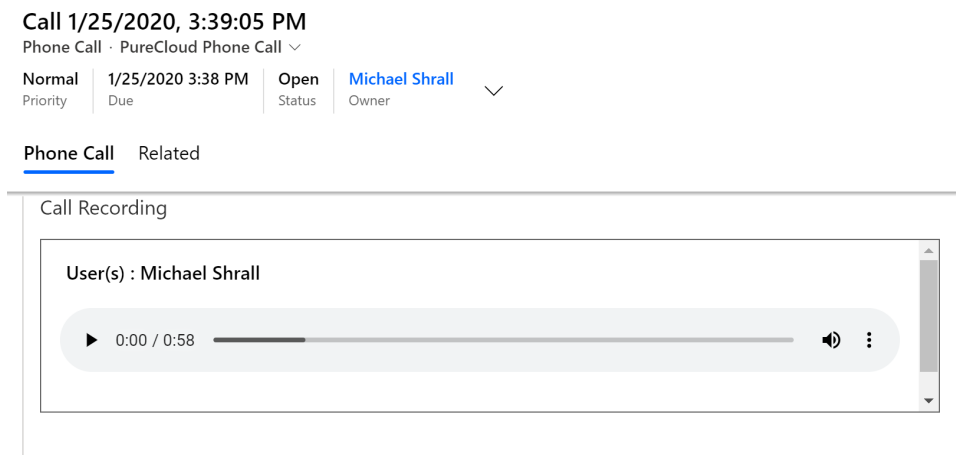
The activity To or From fields can be set when popping an entity like a Case or an Opportunity. This ensures the activity is tied to an individual (Contact, Lead) and a *Regarding* value (Case, Opportunity) when the interaction is delivered. To achieve this, the Who Entity id and type need to be set on the interaction as follows:

- IS_ActivityWhoType – entity type to set the To/From automatically (Ex: contact, lead, account)
- IS_ActivityWhoId – entity id

8.3 Call recording player within Phone Call activity

Within the Dynamics 365 Phone Call activity, users can listen to the call recording without leaving the activity view. This gives users the ability to quickly review previous customer conversations. No call recordings are stored within Dynamics 365, only the reference to the recording.

Note: The recording will only show if the users have access to the Genesys Cloud recording.



8.4 Store messaging transcript

At the end of a Genesys Cloud messaging interaction, the transcript of the interaction can be added to the Genesys Cloud interaction activity entity, for example, Genesys Cloud Chat activity entity (isgc_chat) or the Genesys Cloud Email activity entity (isgc_email) included with InteractionSync.

This setting is applicable for all messaging interactions like chat, web messaging and social media interaction types.

To display in a chat activity:

- To get the transcript to display, click *Insert* to add the *Timeline* component in the Dynamics Genesys Cloud Chat form:



- Set properties to make *Notes* visible (which is where the transcript is saved)
- Below is the result of the configuration changes:

To display in an email activity:

- To get the transcript to display, click *Insert* to add the *Timeline* component in the Dynamics Genesys Cloud Email form:



- Set properties to make *Notes* visible (which is where the transcript is saved)
- Below is the result of the configuration changes:

9 Troubleshooting

9.1 Browser logs

There are times when running InteractionSync a problem is not immediately evident just by behavior alone. Because InteractionSync runs within your browser, this is often the best source of logging to determine how to resolve an issue.

Genesys provides great documentation on how to collect Chrome and console network logs:
<https://help.mypurecloud.com/articles/gather-chrome-console-log/>.

9.2 Unable to sign in to Genesys Cloud

If users are unable to sign in to the Genesys Cloud embedded framework within InteractionSync, confirm InteractionSync has been authorized in the Genesys Cloud org. See [Authorize InteractionSync OAuth client](#)

10 Appendix

10.1 Uninstall InteractionSync

To uninstall ISync:

1. Goto **Power Apps**.
2. Click **Solutions** from the left pane.
3. Navigate to and select **Managed** option.
4. Select the ISync solution you want to uninstall.
5. Click the menu item located next to the selected solution.
6. Click **Delete**.

Result: Deleting the ISync solution successfully uninstalls Interaction Sync.

11 Revision history

Date	Version	Description of change
November 4, 2024	2.93.1	<p>Added <i>TabViews</i> tab to the <i>Configuration</i> tab.</p> <p>Modified <i>Allow Activity for ScreenPop</i> setting content in the <i>Softphone</i> tab.</p> <p>Added <i>ActivityPop</i> setting to the <i>ScreenPop</i> tab > <i>Default queue configuration</i>.</p> <p>Added <i>Script for PhoneCall</i> to the <i>Embedded Interaction Window</i> > <i>Softphone</i> tab.</p> <p>Added <i>Uninstall InteractionSync</i> to the <i>Appendix</i>.</p>
June 3, 2024	2.93.0	<p>Added <i>Voice to Store Message Transcripts</i> setting to the <i>Softphone</i> settings tab.</p> <p>Added <i>Agent configurable option</i> to <i>Minimize Softphone By Default</i> setting.</p> <p>Added <i>Click to Dial from closed Activities</i> setting to the <i>Softphone</i> settings tab.</p> <p>Added <i>New queue configuration</i> to the <i>Screen Pop</i> tab.</p> <p>Added <i>Genesys Credentials</i> to the <i>Configuration</i> tab.</p> <p>Added <i>Queue specific configuration</i> to the <i>Screen pop</i> tab.</p> <p>Added <i>Global Search Type</i> to the <i>Softphone</i> settings tab.</p>
September 13, 2023	2.92.8	<p>Added <i>Survey frequency</i> and <i>Outbound Default Queue ID</i> setting to the <i>Softphone</i> settings tab.</p> <p>Added <i>Open Messaging</i> to <i>Store Message Transcripts</i> setting in the <i>Softphone</i> settings tab.</p>
July 14, 2023	2.92.7	<p>Added <i>Minimize Softphone By Default</i> and <i>Minimize Softphone On All Tabs</i> settings to the <i>Softphone</i> settings tab.</p> <p>Added a note to <i>Update existing activity</i> section.</p>
May 25, 2023	2.92.6	<p>Added <i>Post Call Survey</i>, <i>Allow Post Call Survey</i> and <i>IVR Flow Name</i> to the <i>Softphone</i> settings tab.</p>
March 7, 2023	2.92.4	<p>Added <i>interactionUrl</i> and <i>formattedDuration</i> genesys cloud fields to the <i>Activity Mapping</i> tab.</p> <p>Updated <i>Embedded Interaction Window</i> option.</p> <p>Added new settings <i>ScreenPop on interaction pickup</i> and <i>Allow Activity ScreenPop for outbound interaction</i> to the <i>Softphone</i> settings tab section.</p> <p>Updated <i>Default screen pop search</i> section.</p> <p>Updated <i>New entity</i> section.</p>
April 5, 2022	2.92.3	<p>Added <i>Embedded Interaction Window</i> option to <i>Softphone settings</i> tab configuration.</p> <p>Added <i>Notifications</i> tab to <i>Configure InteractionSync</i> section.</p>
February 7, 2022	2.92.3	Adding Revision history for tracking changes to content.