Contact center integration with CRM

White paper and best practice for Daktela V6 setup with internal CRM system

1. Introduction

The goal of this document is to provide brief description on the CRM integration within Daktela V6 contact center system.

Considering references to Daktela V6 REST API, the specification and ways to implement the API are located at https://www.daktela.com/api/v6/global/general-information except specific integration changes described in this document.

Considering references to Daktela JavaScript CLI, the specification and ways to implement the library are located at https://doc.daktela.com/display/DOCv5/Javascript+CLI+library.

2. Daktela integration description

The Daktela system usually uses the following distinction between few user groups:
- By country - countries are using individual IVRs and each country consists of separate group of users
- By function - each country mostly handles tax refund, early collection, customer care and telesales separately
- Back office vs CC user - some users are using Daktela as described above with full functionality, some users are using Daktela only to support their landlines and do not log in (nor are able to) into the Daktela UI

The CRM integration design counts on provision of the CRM functionality to the users with full contact center features and focuses on the integration primarily within the UI of Daktela V6. This follows the logic of having all the omni-channel interaction accessible to the contact center within one navigational UI.

Daktela V6 is native omni-channel solution and supports some functions of classic CRM itself including interconnection of different channels to the contact detailed card. Using this function may in some cases omit the need for implementing custom external CRM system to support the contact center role. The very specifics of each integration require the integrator to rethink where the core data shall be stored and shall bear in mind that Daktela V6 provides most of the contact center functionality as standalone solution.

The Daktela integration ecosystem that is further described in the following chapters is shown in following diagram:
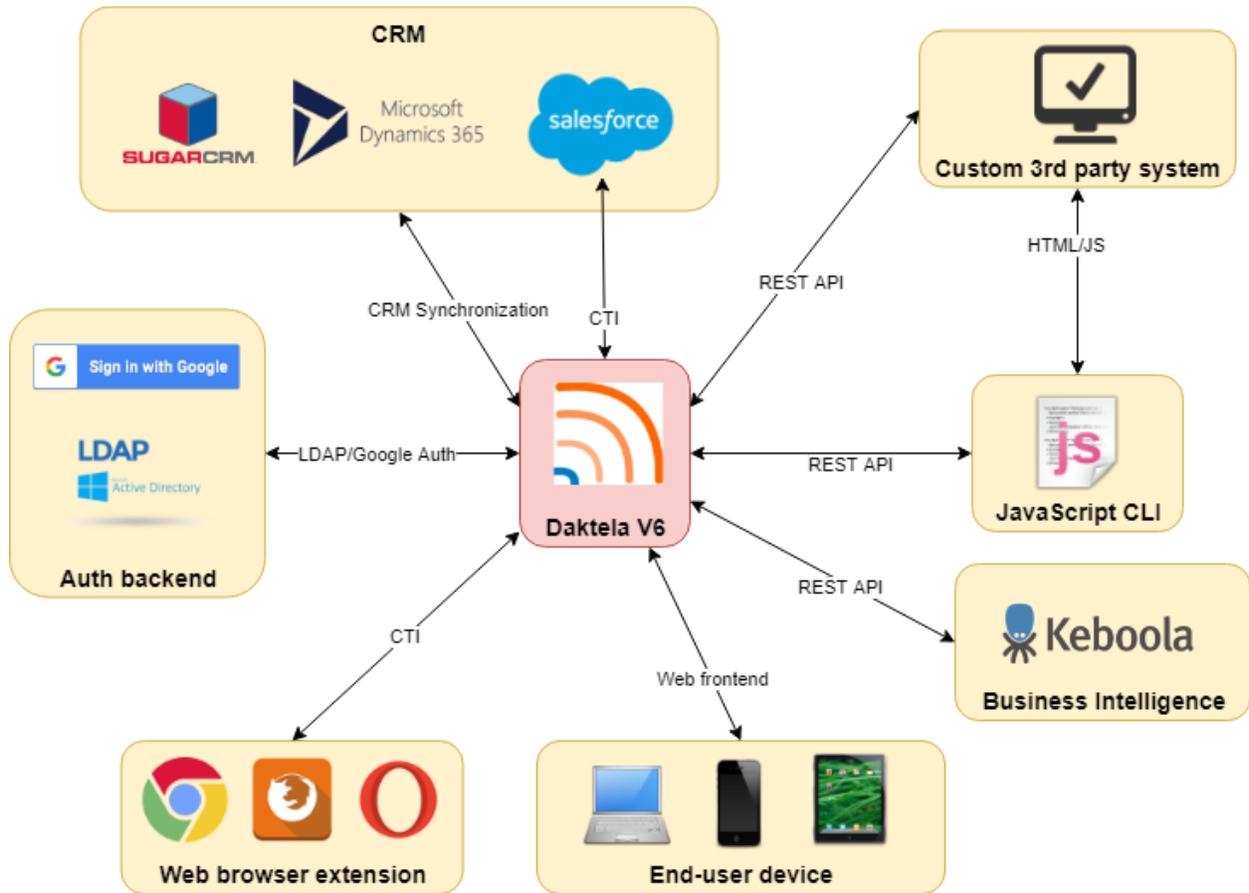
3. CRM integration

The CRM integration shall use the following integration scenarios:
1. Activity widget in agent view
2. CRM synchronization
3. CTI panel

Currently the following CRM systems are supported in the means specified as follows. The individual functions can be easily implemented in any CRM system using Daktela V6 REST API or Daktela JavaScript CLI. The functions as described below are officially supported and developed in coordination with Daktela partners as nearly ready-made solutions.

|	Salesforce	Dynamics	SugarCRM
CTI	Yes	No	No
Contacts synchronization (CRM → Daktela)	Using CRM sync endpoint	Using CRM sync endpoint	Using CRM sync endpoint
Screen pop - contact detail open on incoming activity	Yes	Using custom widget	Using custom widget
Activities synchronization	When using CTI or custom widget	When using custom widget	When using custom widget
Click-to-call on contact info	Yes, using CTI	No	No

3.1. Activity widget

Daktela V6 enables customization of the activity widget based on the activity's queue. The widget can implement iframe component with handing variables to the child page via GET parameters containing information from the activity. Therefore the integration requires development of custom view for contact center within the CRM system.

The URL can contain attributes that are part of the contact center activity, with recommended parameters as follows:
- Caller ID - phone number of the calling party to identify customer within CRM and pair CRM activity to the account record
- Direction - keyword identifying direction of the activity (can contain "in", "out" or "internal")
- Call ID - unique ID of the phone call
- Activity ID - unique ID of the activity

Activity describes relation between user and call, therefore one call can have several activities when transferring call between users, while the call itself (including ID) remains the same. This allows binding the call to all the users that have been working on it during its entire lifecycle.
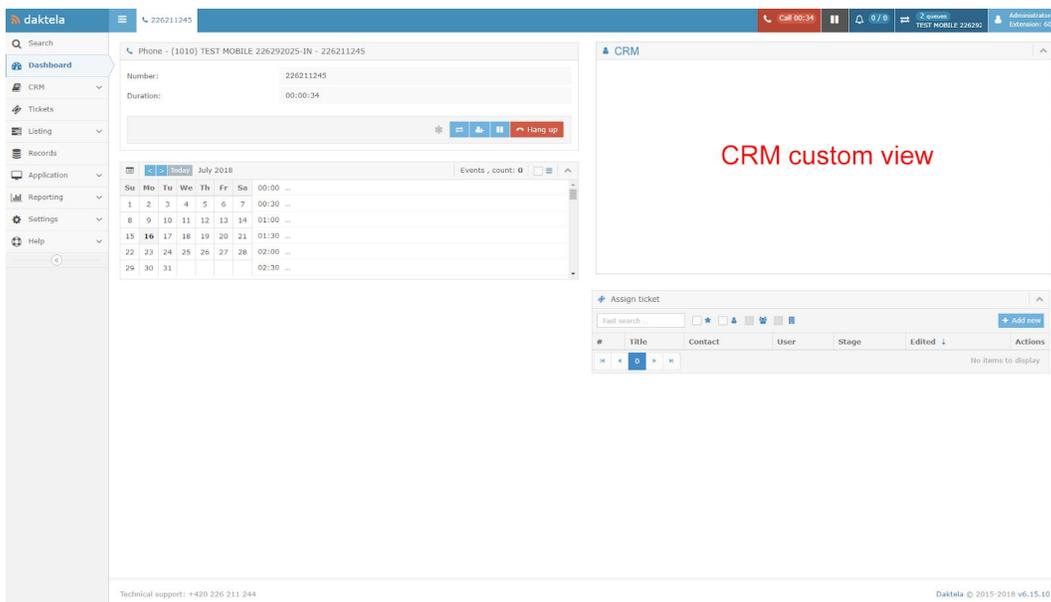
The example request URL shall be formatted as follows:
```
https://crm/daktela.html?clid=773794604&direction=in&callid=1WS.58184
&activity=activities_181sd845a16ds84612sd84
```

The contact center user session is handled by CRM and shall require the user to be logged in the CRM system prior to handling activities within Daktela system.

3.2. CRM synchronization

Daktela V6 provides the contact center users usage of internal simple CRM module. This enables the contact center to be able to pair different contact channels directly to one customer record within Daktela system, thus reaching implementation of full omnichannel logic.

For the purpose of reaching the state described a full load of CRM data from CRM should be implemented. To achieve this a custom designed endpoint is prepared on the side of Daktela. The design proposal below describes working state and can be subject to changes.

The endpoint for the full load requires data sent as POST request and is located at:
`/custom/crm/sync.php`

The data size is limited by POST request maximum size of 20 MB. The full load shall not occur during business hours of the call center. The load supports partial load, but the "delete" attribute has to be omitted in such request. Partial load can be used for daily loads of updated and created contacts only if CRM is able to contain such information.

The full load format consists of JSON data in the following structure:
- **data** - array containing company objects
  - **id** - ID of the company in CRM
  - **name** - name of the company in CRM
  - **description** - custom description of the company in CRM
  - **fields** - array of information about the company in CRM
    - **key** - name of the field in Daktela
    - **value** - value of the information in CRM
  - **contacts** - array containing contacts of the company objects
    - **id** - ID of the contact in CRM
    - **name** - name of the contact in CRM
    - **firstname** - first name of the contact in CRM
    - **Lastname** - last name of the contact in CRM
    - **description** - custom description of the contact in CRM
    - **fields** - array of information about the contact in CRM
      - **key** - name of the field in Daktela
      - **value** - value of the information in CRM
- **delete** - set to "true" if contacts not included in the full load shall be deleted in Daktela (use very cautiously)

If a specific contact is not associated with any company, bind to contact to company with attributes "id", "name" and "description" set to null.

The request example is follows:

```
{
    "data":
        [{
            "id": 1,
            "name": "Daktela s.r.o.",
            "description": "test description",
            "fields": [
                {"key": "number", "value": ["773794604", "775156599"]},
                {"key": "email", "value": ["jiri.havlicek@daktela.com"]}
            ],
            "contacts": [{
                "id": 2,
                "name": "Jiri Havlicek",
                "firstname": "Jiri",
                "lastname": "Havlicek",
                "description": "test contact description",
                "fields": [
                    {"key": "number", "value": ["773794604"]},
                    {"key": "email", "value": ["jirka@havliczech.eu"]}
                ]
            }]
        },
        {
            "id": null,
            "name": null,
            "description": null,
            "contacts": [{
                "id": 3,
                "name": "Jan Novak",
                "firstname": "Jan",
                "lastname": "Novak",
                "description": "test contact description jan novak",
                "fields": [
                    {"key": "number", "value": ["775775775"]},
                    {"key": "email", "value": ["john.doe@example.com"]}
                ]
            }]
        }],
    "delete": false
}
```

The import endpoint updates the Daktela CRM contacts when any change is identified. If the "deleted" attribute is to true, all contacts originating from the CRM system that are not contained in the data load are deleted.

3.3. CTI panel

In some cases the contact center shall require active using of the Daktela V6 directly within custom company CRM. For this purpose the CTI panel is integration within some supported systems. This chapter shall describe the integration within these systems where this is currently available.

3.3.1. Web browser CTI

Daktela V6 enables usage of native CTI panel without any application integration using web browser extension that is freely available without any additional costs. Currently the following web browsers are supported:

- Google Chrome 48+ (Daktela V6 for Chrome at Google Chrome Webstore)
- Mozilla Firefox 48+
- Opera 35+

The web browser extension is integrated as small control panel for Daktela activities under thumbnail icon in the following manner:
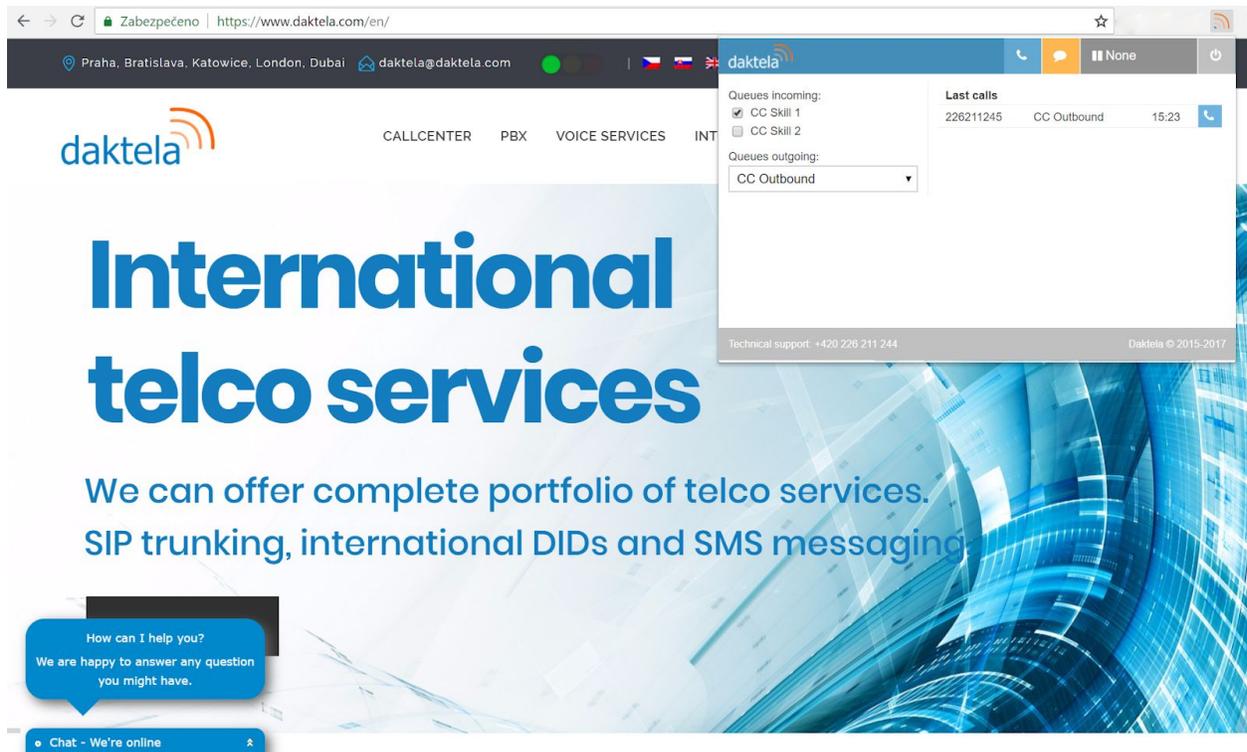

3.3.2. Salesforce Lightning

The CTI integration of Salesforce enables state management and call handling directly within CRM. This includes click-to-call functionality for supported contact types and native activity

logging within the CRM. The functionality is available on Enterprise, Performance, Unlimited, and Developer Editions.

The important thing is all the activities information are handled by the Salesforce itself, therefore the data generated outside the system are not included within the CRM and shall require activity widget integration. The integrated CTI looks as follows:
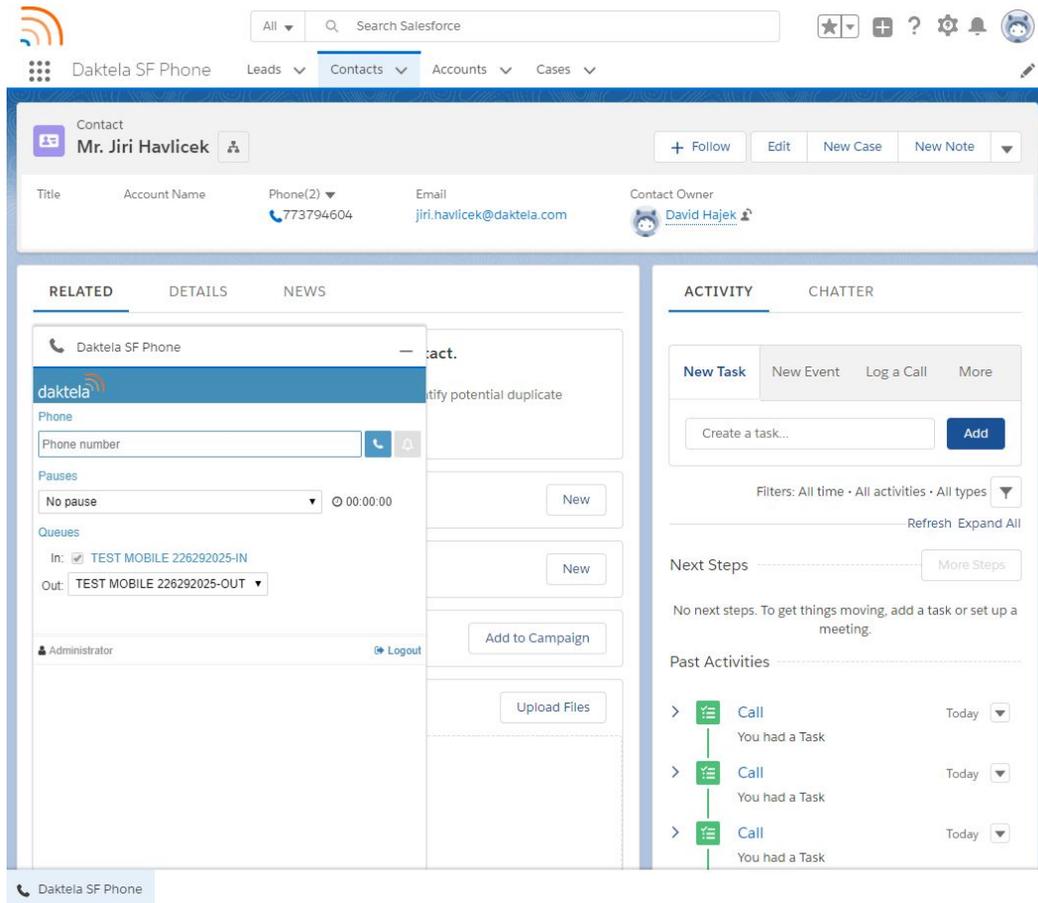
3.3.3. Custom CTI integration

Daktela V6 has two options on how to integrate custom CRM system in the means of Daktela CTI panel. The first one is directly calling the REST API to control the user's environment. The other option is to use Daktela JavaScript CLI library that contains the wrapper methods including the application logic of the contact center system.

For using the Daktela V6 REST API and JavaScript CLI, refer to the links located at the introduction part of this document.

In any case of development of custom CTI integration contact Daktela at the contact info specified in the end of this document to correctly the scenarios of the application integration and to further provide standardized library for additional system integration deployment.

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4. Conclusion

This white paper described the standard scenarios for integration with custom CRM to support the full functionality of contact center role within the company.

For additional remarks the following contact information shall be used:

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