



## Contact center **Integration with CRM**

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

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## 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 omnichannel interaction accessible to the contact center within one navigational UI.

Daktela V6 is a **native omni-channel solution** and supports some functions of classic CRM itself including interconnection of different channels to the contact detail 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 visualization:*

## 3. CRM integration

The CRM integration shall use the following integration scenarios:

- Activity widget in agent view
- CRM synchronization
- CTI panel

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 365	SugarCRM
CTI	Yes	No	No
Contacts synchronization (CRM Daktela)	Yes	Yes	Yes
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

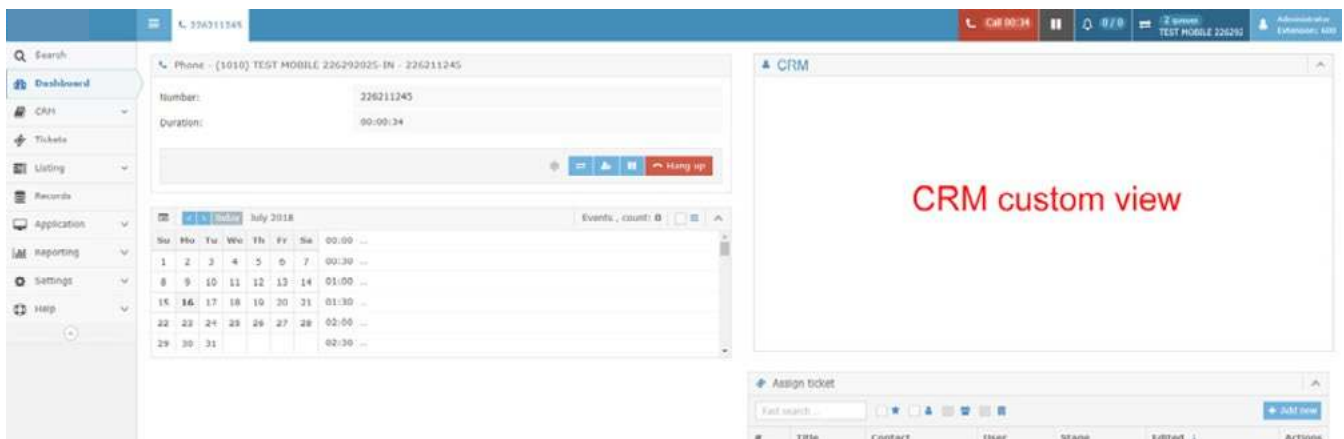
Daktela V6 enables **customization** of the activity widget based on the activity's **queue**. The widget can implement iframe component with handing variables to the child page via GET parameters containing information from the activity. Therefore the integration requires development of **custom view 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 a relationship 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=77379604&direction=in&callid=1WS.58184&activity=activities\\_181s-d845a16ds84612sd84](https://crm/daktela.html?clid=77379604&direction=in&callid=1WS.58184&activity=activities_181s-d845a16ds84612sd84)

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 with the 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 Daktela component called Integrations Proxy is prepared as ready-made solution serving for one-click installation of external CRM. The Integrations Proxy module is directly connected to Daktela V6 internal integration settings and **requires no additional software installation or complex configuration** other than standard described steps ensuring access to the CRM from within Daktela system.

The ready-made integrations can be accessed directly from the settings of individual instance of Daktela. Based on the deployed version this menu item may be called differently, but in most cases such settings can be found under **“Manage” > “Integrations”**.

The integrations settings panel contains individual CRM connectors that can be configured directly from within each configuration menu:

#### CRM synchronization


SalesForce



Salesforce customer relationship management (CRM) is a system consisting of several functionalities to support the processes relevant to maintaining consistent communication with your customers.

Configure

After opening the **“Configure”** section of individual system the system-specific options are shown and after filling in and pairing the **CRM custom fields against Daktela custom fields** the synchronization occurs automatically.

**A How to get authorization data.**

- Go to the URL of your Salesforce installation (e.g. <http://xxx.salesforce.com/>), set this as the **Instance URI** in the integration configuration
- Log In using your admin credentials and fill in the **Username** and **Password** in the Integration configuration
- Click on your user profile icon in the top right corner
- Click on „Settings“
- In the left menu of the Settings view select „Reset My Security Token“
- Confirm the Security Token reset by clicking on „Reset Security Token“ button
- The **Security Token** is then sent to you via e-mail, fill it in the Integration configuration
- Click on the „Settings“ icon in the top right corner and click on „Setup“
- Within the Setup view select „Apps“ -> „App Manager“ in the left menu
- Click on „New Connected App“ in the top right corner
- Fill in the form in following manner:
  - Set the „Connected App Name“ to „Daktela“ or similar, leave the „API Name“ like auto-generated
  - Fill in the Contact Email according to your free will
  - Check the „Enable OAuth Settings“ checkbox
  - Add the „Access and manage your data (api)“ permissions
  - Set the „callback URL“ to any URL (e.g. <https://yourInstance.e.daktela.com>)
- Save the changes
- Within the newly opened detail view you can find the Consumer Key and Consumer Secret, fill these in the **Client ID** and **Client Secret** configuration fields in integration respectively

Instance URI: ⓘ

User name: ⓘ

Password: ⓘ

security token: ⓘ

Client ID: ⓘ

Client secret: ⓘ

Close

Authorize

### 3.3. CTI panel

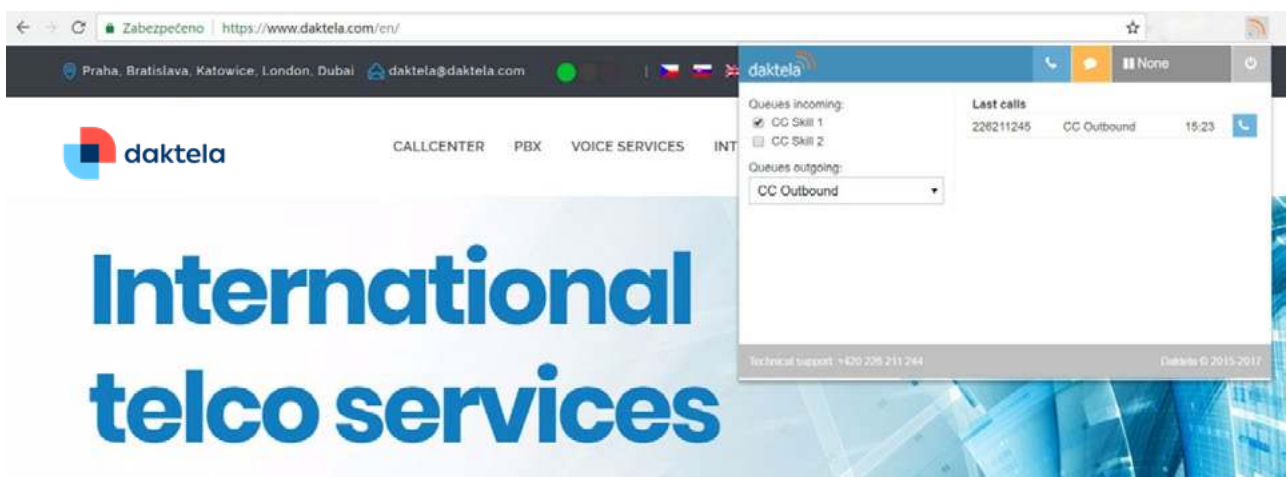
In some cases the contact center shall require active **using of the Daktela V6 directly within custom company CRM**. For this purpose the CTI panel is **integrated** within some supported systems. This chapter shall describe the integration within these systems where this is currently available.

#### 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 a small control panel for Daktela activities under thumbnail icon in the following manner:



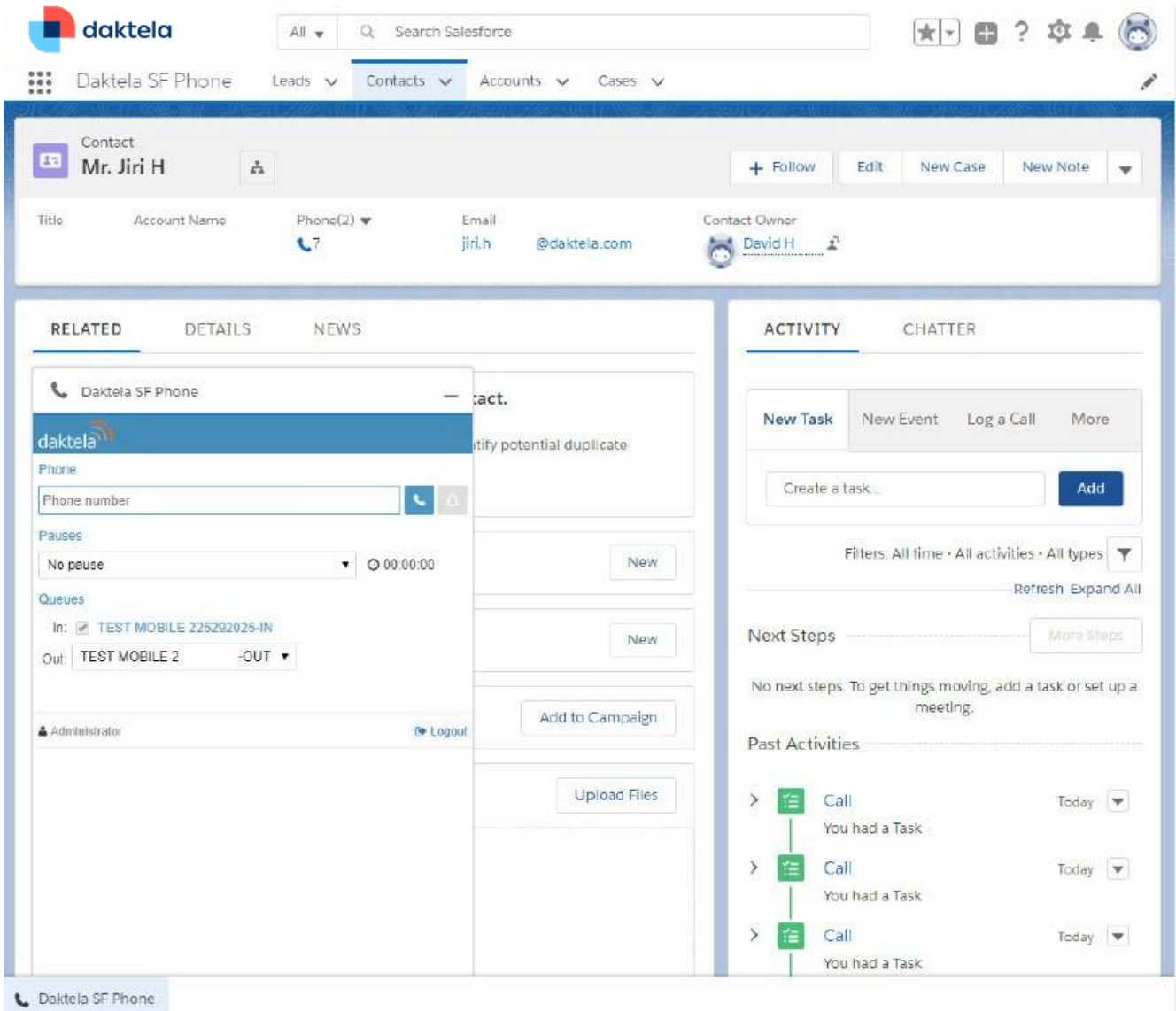
 Click [here](#) to download the extension for Chrome.

 Click [here](#) to download the extension for Firefox.

#### 3.3.2. Ready-made CTI integration

The exemplary 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: (see next page)



The screenshot displays a Salesforce CRM interface for a contact named 'Mr. Jiri H'. The contact details include a phone number, email address (jiri.h@daktela.com), and a contact owner (David H). The interface is divided into several sections: 'RELATED' (showing 'Daktela SF Phone' with a 'Phone' field and 'Pauses' section), 'DETAILS', 'NEWS', 'ACTIVITY' (showing 'Next Steps' and 'Past Activities'), and 'CHATTER'. The 'Daktela SF Phone' panel includes fields for 'Phone number', 'Pauses' (set to 'No pause'), and 'Queues' (with 'In' and 'Out' dropdowns). The 'ACTIVITY' section shows a list of 'Call' activities with a 'You had a Task' message and a 'Today' date filter.

### 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.

## 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:

[daktela@daktela.com](mailto:daktela@daktela.com)

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## Attachment 1

### CASE STUDY Dynamics 365



The following document describes a case study of **implementation of interconnection between Dynamics 365 and Daktela V6 system**. The customer uses Dynamics 365 as core CRM system for about 500 employees and around 150 contact center agents. The contact center units also uses the Daktela V6 system to effectively support its omnichannel operations consisting of call, email and web chat communication.

The implementation project is focused on integrating both systems to allow seamless transition of work during execution of processes and effective non-redundant information exchange. The goals were set as follows:

- **Increase the information interchange** between Dynamics 365 and Daktela V6 **in order to eliminate errors** done by the contact center agents
- Increase the information interchange between Dynamics 365 and Daktela V6 **in order to reduce the work complexity** and therefore **reduce the cost** of agents' education
- Establish Dynamics 365 as the **core customers' data information system** including all communication with customers
- **Provide the contact center with all the benefits of Daktela V6 contact center system as primary communication solution** (realtime contact history pairing, open cases management, omnichannel functionality, ...)

The above mentioned set of goals can be dissolved into functional components that will define **how the integration will take place**:

1. The **core contact data shall be exported from Dynamics 365 CRM to Daktela V6 CRM** in order to enable contact center using the full set of omnichannel functionality
2. The **communication data shall be exported from Daktela V6 to Dynamics 365 CRM** in order to **maintain communication history in one core system**
3. Agents shall **edit customer data only in Dynamics 365 CRM** in order to maintain the master-slave configuration and prevent the occurrence of conflicts

The individual steps require the cooperation of Daktela and Dynamics 365 integrator to enable the implementation of full defined scope of agenda. **The integration project shall be realized using the following technical components:**

- **Daktela Integration Proxy** ensuring the data exchange from Dynamics 365 to Daktela V6
- **Dynamics 365 custom widget** placed within the activity window of Daktela V6
- **Daktela events module** sending communication updates to custom Dynamics 365 API endpoints

See each component described in the following pages.



## Daktela Integration Proxy

The Daktela Integration Proxy is **configurable directly from within Daktela V6** graphical user interface. The integration requires creation of system account on the side of Dynamics 365 and setting appropriate configuration data in the Daktela V6 interface:

X

**▲ How to get authorization data.**

- Go to <https://manage.windowsazure.com/>
- Log in with the administrator account for your Azure domain
- Go to „Azure Active Directory“ within the left menu
- Go to „App registrations“
- Click on „New application registration“
- Enter the name „Daktela“ or similar, Application type „Web app / API“ and „Sign-on URL“ according to free will (e.g. <https://yourinstance.daktela.com>)
- Within the App registration detail use the **Application ID** in the integration configuration, afterwards click on „Settings“
- Click on „Keys“
- Fill in the „Key description“ in the „Passwords“ section and set the expiry to „Never expires“
- After saving the key is shown, set this as the **Application Secret** in the integration configuration
- Go to the Dynamics 365 URL and login as the administrator
- Go to „Settings à Security à Users“ and use the dropdown menu to switch to „Application Users“
- Create new Application User and in the „Application ID“ field fill in the Application ID from the Azure configuration collected from steps before
- Click on „Manage Roles“ in the user detail and add role with corresponding contacts access (e.g. „System Administrator“)

Instance URI:

Application ID:

Application secret:

Close
Authorize


Upon completion of configuration the **Dynamics 365 contact data** are automatically imported into Daktela V6 internal CRM.


## Dynamics 365 custom widget

The custom widget placed directly into activity window serves the agent to **find the contact quickly in the Dynamics 365 CRM**, which enables implementation of **custom logic handling** besides standard Daktela V6 functionality.

The custom widget shall be developed by Daktela and communication with Dynamics 365 using FetchXML interface (or REST API if available). The widget shows the **contact summary with direct linking to the Dynamics 365**.

Note that similar functionality can be achieved using the Daktela CRM as well.



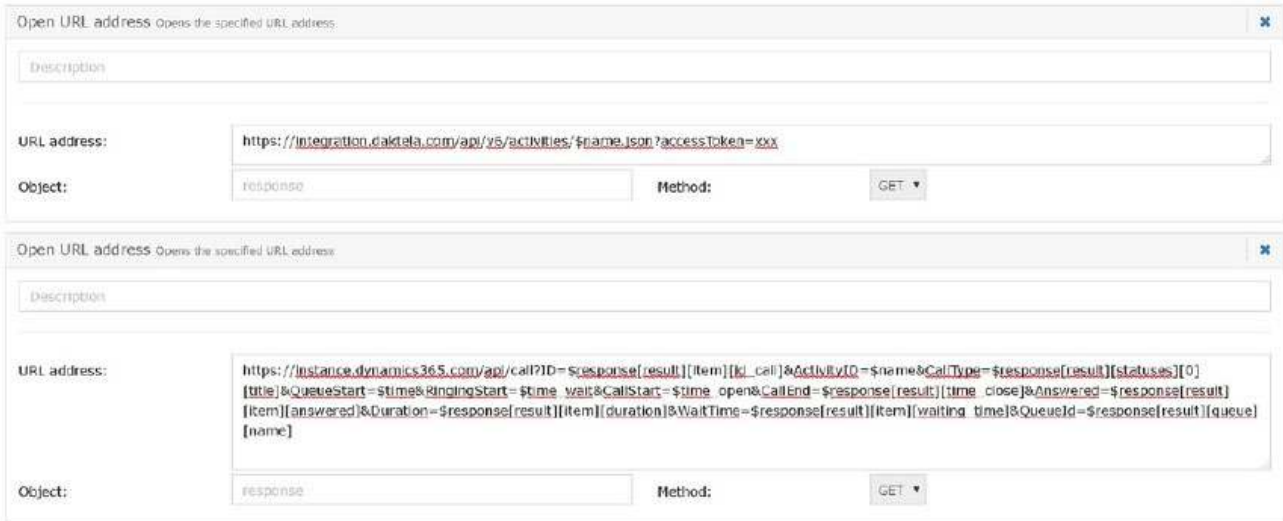


Firstname	Lastname	Email	Phone	
Jiri	Havicek	jiri.havicek@daktela.com	+420 773 794 804	<a href="#">Open</a>
Jiri	Havicek	jiri.havicek@zscout.eu	+420 773 794 804	<a href="#">Open</a>

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## Daktela events

The events module in Daktela V6 has been configured to **send call, email and web chat activity updates right after the activity closure**. Custom Dynamics 365 API has been prepared by the integrator and appropriate communication data have been configured to be transferred from Daktela V6. The **customer communication history is therefore present within Dynamics 365** for all communication channels handled within Daktela V6.



Open URL address: Opens the specified URL address.

Description:

URL address: `https://integration.daktela.com/api/v5/activities/{fname}.json?accessToken=xxx`

Object: response Method: GET

Open URL address: Opens the specified URL address.

Description:

URL address: `https://instance.dynamics365.com/api/call?ID=$response[result][item][kl_call]&ActivityID=$name&CallType=$response[result][statuses][0][title]&QueueStart=$time&RingingStart=$time_wait&CallStart=$time_open&CallEnd=$response[result][time_close]&Answered=$response[result][item][answered]&Duration=$response[result][item][duration]&WaitTime=$response[result][item][waiting_time]&QueueId=$response[result][queue][name]`

Object: response Method: GET

## CONCLUSION

After the project execution the contact center has been able to effectively work within contact center-focused system whilst benefiting from the full scale of Dynamics 365 functionality and **integration with the rest of the company**.

**The Dynamics 365 also remained as the central data storage** of customers data and information concerning communication with them.

The integration enables seamless transition between both systems and effective automated data interchange **eliminating human-based errors** and complex processes that have been previously part of the employee training.