



Administering Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud

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Chapter 1: Introduction

Purpose

This document is intended for administrators and describes how to integrate the Avaya Workspaces for CRM softphone with the following solutions:

- Salesforce
- Dynamics 365
- ServiceNow

Change history

Issue	Date	Summary of changes
Issue 35	January 22, 2024	Minor updates throughout the document.
Issue 34	October 22, 2024	Added information about the configuration for passing ongoing interaction logs to Dynamics 365 at the following topics: <ul style="list-style-type: none">• Activity Options field descriptions on page 94• Creating a table for your contact center logs for ongoing interactions on page 98
		Removed the option Y for local session sharing configuration at the following topics: <ul style="list-style-type: none">• Server Configuration field descriptions on page 38 (Salesforce)• Server Configuration field descriptions on page 60 (Dynamics 365)• Server Configuration field descriptions on page 134 (ServiceNow)
Issue 33	August 30, 2024	Added information about Custom Interaction Log Field 1-3 and Custom Transaction Log Field 1-3 at the following topics: <ul style="list-style-type: none">• Activity Options field descriptions on page 61 (Dynamics 365)• Activity Options field descriptions on page 124 (ServiceNow)

Table continues...

Issue	Date	Summary of changes
		Updated the URLs at Installing the APEX package on page 12.
		Updated Checklist for enabling VDI support for agents on page 143 with information on adding Citrix URL as a trusted domain on Keycloak Tenant configuration and added further information at Adding Citrix URL as trusted domain on page 145.
		Added information about the recently added features for Salesforce integration at Avaya Workspaces for CRM integration with Salesforce overview on page 9.

Chapter 2: Avaya Workspaces for CRM integration with Salesforce overview

Salesforce is a Customer Relationship Management (CRM) solution that enables you to integrate all departments of your company into a single platform for managing your interactions with customers. CRM refers to all of the processes and tools that manage customer relationships. With Salesforce, you can collaborate and engage with your employees and partners, while securely storing your data in the cloud.

Avaya Workspaces for CRM integration with Salesforce enables agents in your call center to perform the following actions while using the Salesforce functionality:

- Access the Avaya Workspaces for CRM softphone on the Salesforce website.
- Handle inbound and outbound customer interactions.
- Make internal calls.
- Perform screenpop, click-to-dial, and save interaction logs.
- Access Salesforce Directory.
- Send data to Salesforce Lightning components, Lightning flows and Visualforce pages.
- Agent synchronization with Salesforce Omnichannel.

Agents use the Avaya Workspaces for CRM softphone capabilities to communicate with customers and the Salesforce integration to manage the associated Salesforce information. For example, an agent can accept digital interactions using the Avaya Workspaces for CRM softphone and associate them with various Salesforce components, such as tasks, cases, leads, and notes. Avaya Workspaces for CRM is optimized for the Salesforce Lightning Experience interface and supports both Lightning Standard and Lightning Console modes.

Note:

Salesforce uses special terminology to refer to aspects of customer interactions. This guide references some of this terminology, such as cases, opportunities, and tasks. This guide also contains procedures which only apply to Salesforce software. If you are using other CRM software, this terminology and these procedures do not apply.

This integration also includes supervisor functionalities. For example, it enables supervisors in your call center to monitor agents and intervene with customers. Within the Avaya Workspaces for CRM softphone, supervisors can use the supervisor dashboard to view the currently active agents

and perform supervisor tasks, such as observing interactions, coaching agents, and barging into interactions.

For more information about how agents and supervisors can use the Avaya Workspaces for CRM softphone within Salesforce, see *Using Avaya Experience Platform™ Public Cloud Avaya Workspaces for CRM*.

As an administrator, you must perform the tasks required for completing the integration of Avaya Workspaces for CRM with Salesforce. When completing the integration, you can configure your call center properties and manage your agents' experience. For example, you can enable your agents to transfer calls and set up conferences.

This guide describes the Salesforce procedures required for the integration process. For more information about administering Salesforce, see <https://help.salesforce.com/>.

Related links

- [Checklist for configuring Avaya Workspaces for CRM in Salesforce](#) on page 10
- [Installing the APEX package](#) on page 12
- [Enabling the Lightning Experience application to display the Avaya Workspaces for CRM softphone](#) on page 12
- [Downloading the CRM configuration file](#) on page 13
- [Importing the Call Center Definition file](#) on page 13
- [Configuring your call center](#) on page 14
- [Configuring a softphone layout](#) on page 42
- [Configuring screen pop settings for inbound calls](#) on page 43
- [SSO for Salesforce](#) on page 45
- [Avaya Workspaces for CRM Integration Overview](#)

Checklist for configuring Avaya Workspaces for CRM in Salesforce

Perform the following tasks to integrate Avaya Workspaces for CRM with Salesforce:

No.	Task	Description	✓
1.	Install the APEX package.	You must install the APEX package to enable your agents to access the Avaya Workspaces for CRM softphone.	
2.	Enable your Lightning Experience application to display the Avaya Workspaces for CRM softphone.	If you are using the Lightning Experience application, configure it to display the Avaya Workspaces for CRM softphone on the Utility Bar.	

Table continues...

No.	Task	Description	✓
3.	Import the Call Center Definition file to Salesforce.	Download the Call Center Definition file from https://support.avaya.com or https://plds.avaya.com/ and import it to Salesforce in XML format to configure your call center properties.	
4.	Configure your call center.	<p>Within the Call Center Definition file, you can configure and change the properties of the Avaya Workspaces for CRM softphone.</p> <p>The Call Center Definition file enables you to manage the agent experience. For example, you can define whether Avaya Workspaces for CRM displays pop-up notifications to agents.</p>	
5.	Configure the softphone layout.	<p>You can configure the softphone layout for inbound, outbound, and internal calls. Customize the softphone layout to define the Salesforce call-related fields and objects displayed in Avaya Workspaces for CRM.</p> <p>This step is optional. If you do not configure the softphone layout, Avaya Workspaces for CRM displays the default layout to agents.</p>	
6.	Configure screen pop settings for inbound calls.	<p>When configuring the softphone layout for inbound calls, specify the pages that Avaya Workspaces for CRM displays to agents when the details of an inbound call match or do not match the existing records in Salesforce.</p> <p>This step is optional. If you do not configure the screen pop settings for inbound calls, Avaya Workspaces for CRM displays the pages based on the default layout. You can configure the page that Avaya Workspaces for CRM displays to agents in the following scenarios:</p> <ul style="list-style-type: none"> • An agent accepts an inbound call and the call details do not match the existing Salesforce records. • An agent accepts an inbound call and the call details match one existing Salesforce record. • An agent accepts an inbound call and the call details match multiple existing Salesforce records. 	

Related links

- [Customer Journey - Workspaces for Salesforce](#)
- [Testing Workspaces for Salesforce](#)

Installing the APEX package

About this task

Install the APEX package to enable your agents to access the Avaya Workspaces for CRM softphone.

Procedure

1. To install the APEX package for a test organization, navigate to the following URL: <http://test.salesforce.com/packaging/installPackage.apexp?p0=04t5w000005PndM>
2. To install the APEX package for a production organization, navigate to the following URL: <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5w000005PndM>
3. On the Install Avaya IXWS page, select **Install for All Users**.
4. Click **Install**.

When the installation is complete, you receive an email notification.

Related links

[Installing the APEX Package in Salesforce](#)

Enabling the Lightning Experience application to display the Avaya Workspaces for CRM softphone



About this task

Enable the Lightning Experience application to display the Avaya Workspaces for CRM softphone on the Utility Bar to agents using the Lightning Experience view.

Before you begin

Configure a Lightning Experience application for your call center. For more information about configuring the Lightning Experience application, contact your Salesforce administrator.

Procedure

1. At the top of the Salesforce home page, click .
2. In the pop-up window, click **Setup**.
3. Go to **Apps > App Manager**.
Salesforce displays the Lightning Experience App Manager page.
4. Locate the Lightning Experience application configured for your call center and click  next to it.
5. In the pop-up window, click **Edit**.
6. Click **Utility Items (Desktop Only)**.

7. Click **Add Utility Item**.
8. In the pop-up window, locate the **Open CTI Softphone** option in the list and click it.
Salesforce displays the Phone tab configuration fields.
9. **(Optional)** To change the name of the Avaya Workspaces for CRM softphone that Salesforce displays on the Utility Bar, in **Label**, type a name for your softphone.
10. In **Panel Width**, type 260.
11. In **Panel Height**, type 600.
12. **(Optional)** To enable Avaya Workspaces for CRM automatically when an agent logs in, select **Start automatically**.
13. Click **Save**.

Downloading the CRM configuration file

Procedure

1. Go to <https://support.avaya.com> to download the Call Center Definition or Software Package for your CRM.
2. Navigate to **Support for Product > Downloads**.
3. In the **Enter Product Name** field, enter Avaya Experience Platform™ Public Cloud.

A list of available software packages is displayed.

This configuration file is also available on <https://plds.avaya.com/> under the name Experience Platform Workspaces for CRM.

Related links

[Avaya Workspaces for CRM integration with Salesforce overview](#) on page 9
[Importing the Call Center Definition file](#) on page 13

Importing the Call Center Definition file


About this task

Import the Call Center Definition (CCDef) file to create a record of your call center in Salesforce. The CCDef file is in XML format. After importing the CCDef file to Salesforce, you can configure your call center properties.

Before you begin

Download the configuration file from the Avaya Support website.

Procedure

1. At the top of the Salesforce home page, click .
2. In the pop-up window, click **Setup**.
3. On the Setup page, go to **Feature Settings > Service > Call Center > Call Centers**.
4. Click **Import**.
5. Click **Choose File** and select the required file.
6. Click **Import**.

Related links

- [Avaya Workspaces for CRM integration with Salesforce overview](#) on page 9
- [Configuring your call center](#) on page 14
- [Downloading the CRM configuration file](#) on page 13

Configuring your call center


About this task

Configure your call center to define how Avaya Workspaces for CRM handles incoming and outgoing interactions and manages your agents' experience. For example, you can enable your agents to transfer calls and set up conferences.

Before you begin

Import the CCDef file for your call center to Salesforce.

Procedure

1. At the top of the Salesforce home page, click .
2. In the pop-up window, click **Setup**.
3. On the Setup page, go to **Feature Settings > Service > Call Center > Call Centers**.
4. Locate the call center to configure and click it.

Salesforce displays the Call Center Detail page containing the selected call center configuration.
5. At the top of the page, click **Edit**.
6. Fill in the fields.

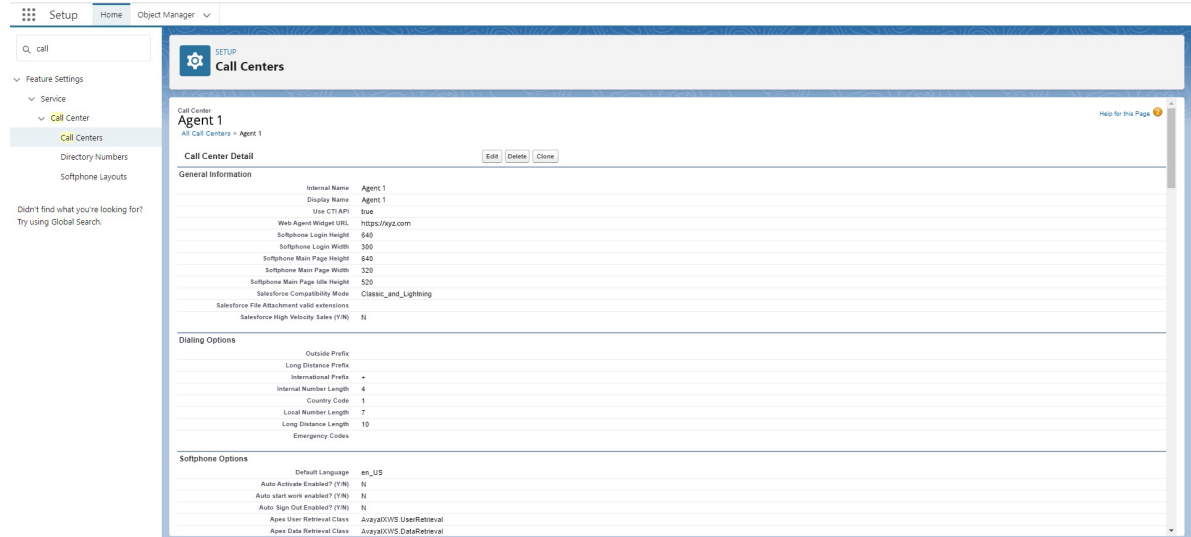


Figure 1: Example of the Salesforce contact center configuration screen

7. Click **Save**.

Related links

- [Avaya Workspaces for CRM integration with Salesforce overview](#) on page 9
- [General Information field descriptions](#) on page 15
- [Dialing Options field descriptions](#) on page 18
- [Softphone Options field descriptions](#) on page 19
- [Activity Options field descriptions](#) on page 28
- [Screen Pop Options field descriptions](#) on page 33
- [Server Configuration field descriptions](#) on page 38
- [Reason Codes Enabled field descriptions](#) on page 39
- [Not Ready Reason Codes Map with Omnichannel field descriptions](#) on page 40
- [Label Options field descriptions](#) on page 41
- [Importing the Call Center Definition file](#) on page 13
- [Configuring Call Center Definition in Salesforce](#)


General Information field descriptions

Name	Description
Internal Name	<p>The name of your CCDef file. If you have multiple call centers, each must have a unique Internal Name. After you configure the Internal Name for your CCDef, you cannot change it.</p> <p>You can type a maximum of 40 alphanumeric characters with no spaces or punctuation marks. The Internal Name must start with an alphabetic character.</p>

Table continues...

Name	Description
Display Name	<p>The name of your call center that Salesforce displays in the All Call Centers table. If you have multiple call centers, each must have a unique Display Name.</p> <p>You can type a maximum of 1000 UTF-8 characters.</p>
Use CTI API	<p>The option to use CTI API in your CCDef. Ensure that the value in this field is true.</p>
Web Agent Widget URL	<p>The entry point that Salesforce uses to fetch Avaya Workspaces for CRM from Avaya Experience Platform™ Public Cloud.</p> <p>To enter this URL, you must build it. For more information, see Building a URL for the Web Agent Widget URL field on page 17.</p>
Softphone Login Height	<p>The height of the Avaya Workspaces for CRM softphone during user login. You can type a value corresponding to the required height in pixels. The default value is 640.</p>
Softphone Login Width	<p>The width of the Avaya Workspaces for CRM softphone during user login. You can type a value corresponding to the required width in pixels. The default value is 300.</p>
Softphone Main Page Height	<p>The height of the Avaya Workspaces for CRM softphone after the user logs in. You can type a value corresponding to the required height in pixels. The default value is 640.</p> <p>This value is used when the agent has at least one interaction card in the Avaya Workspaces for CRM softphone. If the agent has none, the height of the Avaya Workspaces for CRM softphone is determined by the value in the Softphone Main Page Idle Height field.</p> <p>* Note:</p> <p>To disable softphone resizing between idle mode and interaction mode, you can type the same value in the Softphone Main Page Height and Softphone Main Page Idle Height fields.</p>
Softphone Main Page Width	<p>The width of the Avaya Workspaces for CRM softphone after the user logs in. You can type a value corresponding to the required width in pixels. The default value is 300.</p>
Softphone Main Page Idle Height	<p>The height of the Avaya Workspaces for CRM softphone after the user logs in. You can type a value corresponding to the required height in pixels. The default value is 520.</p> <p>This value is used when the agent has no interaction cards in the Avaya Workspaces for CRM softphone. If the agent has an interaction card, the height of the Avaya Workspaces for CRM softphone is determined by the value in the Softphone Main Page Height field.</p> <p>* Note:</p> <p>To disable softphone resizing between idle mode and interaction mode, you can type the same value in the Softphone Main Page Height and Softphone Main Page Idle Height fields.</p>

Table continues...

Name	Description
Salesforce Compatibility Mode	The Salesforce modes in which you can use the Avaya Workspaces for CRM softphone.
Salesforce File Attachment valid extensions	The type of files that agents can attach during messaging interactions.
Salesforce High Velocity Sales (Y/N)	<p>The option to enable and disable the High Velocity Sales feature.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: The High Velocity Sales feature is enabled. • N: The High Velocity Sales feature is disabled. This is the default value. <p> Note:</p> <p>You must enable the following features to use the High Velocity Sales feature:</p> <ul style="list-style-type: none"> • Click-to-Dial • Call Logging • Lightning

Related links

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[Building a URL for the Web Agent Widget URL field](#) on page 17

Building a URL for the Web Agent Widget URL field

About this task

Build a URL to enter it in the **Web Agent Widget URL** field when configuring your call center. Salesforce uses this URL to fetch Avaya Workspaces for CRM from Avaya Experience Platform™ Public Cloud. You can configure the **Web Agent Widget URL** field in the General Information section on the Call Center Detail page.


Before you begin

Obtain the following URLs from Avaya:

- The Avaya Workspaces URL
- The URL of the Avaya Experience Platform™ Public Cloud server

Procedure

1. In **Web Agent Widget URL**, enter your Avaya Workspaces URL.
For example, `https://example.workspaces.avayacloud.com`
2. Add `/sfdc-workspaces/?tenantId=` to the entered URL.
3. Add the account ID to the entered URL.
4. **(Optional)** To copy your account ID, do the following:
 - a. Log in to Application Center Administration.

- b. In the navigation tree, click **Account**.
- c. On the Account page, locate your account and click  next to it.

The account ID is added to your clipboard.

- 5. Add `&tenantUrl=` to the entered URL.
- 6. Add the URL of the Avaya Experience Platform™ Public Cloud server without the `https://` protocol to the entered URL.

For example, if the URL of the Avaya Experience Platform™ Public Cloud server is

`https://example.avayacloud.com`, you must add `example.avayacloud.com` to the entered URL.

- 7. Add `/auth/realms/` to the entered URL.
- 8. Add the account ID to the entered URL.

To add the account ID to your clipboard, repeat step 4.

- 9. Click **Save**.

Salesforce fills the **Web Agent Widget URL** field with the entered URL.

Example

The entered URL must consist of the following parts:

```
<Avaya Workspaces URL>/sfdc-workspaces/?tenantId=<Account ID>&tenantUrl=<The URL of the Avaya Experience Platform™ Public Cloud server without the https:// protocol>/auth/realms/<Account ID>
```

In the example above, the parts of the URL surrounded by "<" and ">" symbols are unique values that you must enter manually.


Related links

[Configuring your call center](#) on page 14

Dialing Options field descriptions

Name	Description
Outside Prefix	The prefix that agents enter to initiate external calls. The default value is 9. You can also leave this field blank.
Long Distance Prefix	The prefix to initiate long-distance calls. In Canada and the US, this prefix is 1. In the rest of the world, it is usually 0. The default value is 1. You can also leave this field blank.
International Prefix	The prefix to initiate international calls. In Canada and the US, the prefix for international calls is 011. In the rest of the world, it is usually 00. The default value is 011. You can also leave this field blank.

Table continues...

Name	Description
Internal Number Length	<p>The length of internal numbers within your call center. The default value is 4.</p> <p>If the length of a phone number is equal to or less than the entered value, Avaya Workspaces for CRM treats the phone number as an internal number.</p> <p>If the length of a phone number is greater than the entered value, Avaya Workspaces for CRM treats the phone number as an external number.</p> <p> Note:</p> <p>If your local dial plan uses extensions with the same length as Local Number Length, set this value to 0. If you type 0, Avaya Workspaces for CRM treats all phone numbers as external numbers.</p> <p>Do not leave this field blank.</p>
Country Code	<p>The country code for the current location of your contact center. Avaya Workspaces for CRM uses this value for enhanced outbound number processing.</p> <p>The default value is 1. Do not leave this field blank.</p>
Local Number Length	The length of external local phone numbers. The default value is 7.
Long Distance Length	The length of long-distance external phone numbers. Avaya Workspaces for CRM uses this value to analyze outbound numbers and determine the required prefixes. The default value is 10.
Emergency Codes	<p>The emergency numbers to call emergency service providers. For example, in the United States, the emergency number is 911. If you type an emergency number in this field, and an agent dials the number, Avaya Workspaces for CRM initiates an emergency call. Emergency calls are routed directly to emergency service providers, and they ignore the existing dialing rules.</p> <p>You can type multiple emergency numbers separated by commas. To disable the emergency calling feature, leave this field blank.</p> <p>For more information about emergency calling, see the Managing users section in <i>Administering Avaya Experience Platform™ Public Cloud</i>.</p>

Related links

[Configuring your call center](#) on page 14

Softphone Options field descriptions

Name	Description
Default Language	Backup language setting for Avaya Workspaces for CRM. This setting is used if the language configured in the Salesforce UI is not supported. If Avaya Workspaces for CRM does not support the language configured in this Default Language field, it uses English.

Table continues...

Name	Description
Auto Start Work Enabled? (Y/N)	<p>The option to automatically initiate Start Work when agents log in to Avaya Workspaces for CRM.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: The agent automatically enters the Start Work mode without pressing any buttons. • N: The agent does not automatically enter the Start Work mode after logging in. <p>If you set Auto Start Work Enabled? to N, you can further configure the Start Work Buttons (SW/R/NR/US) and Start Work State (R/NR) options.</p>
Start Work Buttons (SW/R/NR/US)	<p>The option to configure the Start Work button behavior.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • SW (Start Work): Avaya Workspaces for CRM displays the Start Work button. • R (Ready): Avaya Workspaces for CRM displays the Ready button. • NR (Not Ready): Avaya Workspaces for CRM displays the Not Ready button. • US (User Selection): Avaya Workspaces for CRM displays the Ready and Not Ready buttons.
Start Work State (R/NR)	<p>The option to put the agents into the Ready or Not Ready state after Start Work is initiated.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • R (Ready): The agent state switches to Ready after Start Work is initiated. • NR (Not Ready): The agent state switches to Not Ready after Start Work is initiated. <p>You can configure Start Work State (R/NR) if the server supports Start Work with the agent state selection. If the server supports Start Work with the agent state selection, the agent state switches automatically after Start Work is initiated.</p>
Auto Sign Out Enabled? (Y/N)	<p>The option to automatically perform the Finish Work step when agents log out of Avaya Workspaces for CRM.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents do not click Finish Work before logging out. • N: Agents must click Finish Work before logging out.
Apex User Retrieval Class	<p>The name of the Apex User Retrieval Class that Avaya Workspaces for CRM uses to get information about the logged in Salesforce user.</p>

Table continues...

Name	Description
Apex Data Retrieval Class	The name of the Apex User Retrieval Class that Avaya Workspaces for CRM uses to perform a search within Salesforce.
Apex Object Retrieval Class	The name of the Apex Object Retrieval Class that Avaya Workspaces for CRM uses to get information about the required Salesforce object.
Apex Salesforce Directory Class	The name of the Apex Salesforce Directory Class that fetches the directory numbers to Salesforce Lightning.
Apex Get Pick List Values Class	The name of the Apex Pick List Values Class that Avaya Workspaces for CRM uses to get the custom drop-down values from Salesforce.
Log Report URL	<p>The URL that Avaya Workspaces for CRM uses when an agent clicks My Report Label.</p> <p>You can configure the default value for this field using the CCDef XML file.</p>
Click-to-Dial Enabled? (Y/N/P/I)	<p>The option to enable the click-to-dial feature.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can use the click-to-dial feature. • N: Agents cannot use the click-to-dial feature. If you disable the click-to-dial feature, Salesforce automatically disables the click-to-consult feature. • P (Pre-fill): Agents can use the click-to-dial feature. When an agent clicks a number, Avaya Workspaces for CRM displays this number in the Find Someone field and the agent can modify the number before initiating the call. • I (Interrogation): Agents can use the click-to-dial feature. When an agent clicks a number, Avaya Workspaces for CRM displays a confirmation window before initiating the call.

Table continues...

Name	Description
Click-to-Consult Enabled? (Y/N/T/C/P/I)	<p>The option to enable the click-to-consult feature. With the click-to-consult feature, the agent who handles an active call can click a number and initiate a consultative call or transfer the active call.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can use the click-to-consult feature. • N: Agents cannot use the click-to-consult feature. • T (Transfer): Agents can use the click-to-consult feature. When an agent clicks a number while on an active call, Avaya Workspaces for CRM performs a blind transfer. • C (Consult): Agents can use the click-to-consult feature to initiate a consultative call. • P (Pre-fill): Agents can use the click-to-consult feature. When an agent clicks a number while on an active call, Avaya Workspaces for CRM displays this number in the Find Someone field. The agent can modify the number before initiating the call. • I (Interrogation): Agents can use the click-to-consult feature. When an agent clicks a number while on an active call, Avaya Workspaces for CRM displays a confirmation window before initiating the call. In the confirmation window, the agent can select Consult to initiate a consultative call or Blind Transfer to transfer the active call.
Enable manual Not Ready selection (Y/N)	<p>The option to enable agents to switch the agent state to Not Ready.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can switch the agent state to Not Ready. • N: Agents cannot switch the agent state to Not Ready. Avaya Workspaces for CRM does not display this option in the agent state list. The agent state switches to Not Ready if the server initiates it. For example, if an agent does not answer a routed interaction.
Enable manual After Contact Work selection (Y/N)	<p>The option to enable agents to switch the agent state to After Contact Work.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can switch the agent state to After Contact Work. • N: Agents cannot switch the agent state to After Contact Work. Avaya Workspaces for CRM does not display this option in the agent state list. The agent state switches to After Contact Work if the server initiates it. For example, if an agent ends a routed interaction.

Table continues...

Name	Description
Enable Transfer? (Y/C/N)	<p>The option to enable the call transfer feature.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can initiate blind and consulted transfers to other agents or a queue. • C (Consult): Agents can initiate consulted transfers to other agents or a queue. They cannot initiate blind transfers. • N: Agents cannot initiate transfers. <p>If you set the Enable Transfer and Enable Conference to N, agents cannot initiate a consult call.</p>
Enable Conference? (Y/C/N)	<p>The option to enable the conference feature.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can initiate consulted calls as conferences. • C (Consult): Agents can initiate consulted calls as conferences. • N: Agents cannot initiate conferences. <p>If you set the Enable Transfer and Enable Conference to N, agents cannot initiate a consult call.</p>
Server Response Timeout (seconds)	<p>The option to set a timeout value for processes that require a response from the Salesforce server; for example, when you activate an agent. The default value is 120.</p> <p>If a process lasts longer than the entered value, Avaya Workspaces for CRM displays the Reset Session button. When a user clicks this button, the server receives a logout request. You can use a value of 0 to disable this feature.</p>
Auto Accept Interaction? (Y/A/N)	<p>The option to automatically accept incoming interactions.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM automatically accepts all incoming interactions. • A (ACD): Avaya Workspaces for CRM automatically accepts routed interactions (ACD, VDN). • N: Avaya Workspaces for CRM does not automatically accept incoming interactions.

Table continues...


Name	Description
Logging security level (N/M/H/D)	<p>The security level of Avaya Workspaces for CRM logs. The security level determines whether the created logs contain fields corresponding to personally identifiable information, such as the customer name, email, or phone number.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • N (None): The created logs contain fields corresponding to identifiable personal information. • M (Medium): The created logs contain fields corresponding to identifiable personal information. Avaya Workspaces for CRM replaces the values in these fields with the following message: <code>adfconnect-value-exists</code>. • H (High): The created logs do not contain fields corresponding to identifiable personal information. • D (Disabled): Avaya Workspaces for CRM does not create interaction logs.
Log persistence duration (minutes)	<p>The time during which Avaya Workspaces for CRM stores logs in the session storage. Type a value in minutes.</p>
Enable drop incoming interaction (Y/I/N)	<p>The option to enable agents to end incoming interactions.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can end incoming interactions. • I (Internal): Agents can only end internal interactions. Agents cannot end routed interactions. • N: Agents cannot end incoming interactions.
Enable manual outbound interaction (Y/N)	<p>The option to enable agents to initiate manual interactions. Agents can initiate interactions using the dialpad, Redial button, history list, or search box.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can initiate manual interactions. • N: Agents cannot initiate manual interactions. <p> Note:</p> <p>This setting does not affect the Click-to-Dial and Click-to-Consult features.</p>

Table continues...

Name	Description
Omnichannel Enabled? (C/S/N)	<p>The option to enable agent state synchronization between the Avaya Workspaces for CRM and Salesforce Omnichannel queues.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • C (Complementary mode): The default agent state in Avaya Workspaces for CRM and Salesforce Omnichannel is Not Ready. When the agent state in Avaya Workspaces for CRM changes to Ready, the agent state in Salesforce Omnichannel changes to Not Ready. • S (Synchronized mode): The agent state changes simultaneously in both Salesforce Omnichannel and Avaya Workspaces for CRM. When the agent accepts an interaction in one queue, the agent state in the other queue changes to Not Ready. • N: Salesforce Omnichannel is disabled.
Omnichannel Ready Status Id	<p>The option to indicate the Salesforce Ready state ID. You can type multiple Ready state IDs separated by a semicolon. For example, you can type: 0N50S000000000Cj; 0N50S000000000CK; 0N550000000000k; 0N50S000000000CP.</p> <p>When the agent state in Salesforce changes to Ready and the Ready state ID matches one of the IDs entered in the Omnichannel Ready Status Id field, the agent state in Avaya Workspaces also changes to Ready.</p> <p>When the agent state in Avaya Workspaces changes to Ready, the agent state in Salesforce changes to the Ready state with the Ready state ID that matches the first ID entered in the Omnichannel Ready Status Id field.</p> <p>You must type at least one Ready state ID.</p>
Omnichannel Not Ready Status Id	<p>The option to indicate the Salesforce Not Ready state ID. You can type multiple Not Ready state IDs separated by a semicolon. For example, you can type: 0N50S000000000Cj; 0N50S000000000CK; 0N550000000000k; 0N50S000000000CP.</p> <p>When the agent state in Salesforce changes to Not Ready and the Not Ready state ID matches one of the IDs entered in the Omnichannel Not Ready Status Id field, the agent state in Avaya Workspaces also changes to Not Ready.</p> <p>When the agent state in Avaya Workspaces changes to Not Ready, the agent state in Salesforce changes to the Not Ready state with the Not Ready state ID that matches the first ID entered in the Omnichannel Not Ready Status Id field.</p> <p>You can associate the entered Salesforce Not Ready state IDs with the Avaya Workspaces Not Ready reason codes using the Not Ready Reason Code Map with Omnichannel 1-20 fields.</p>

Table continues...




Name	Description
Omnichannel After Contact Work Status Id	<p>The option to indicate the Salesforce Not Ready state ID and associate it with the Avaya Workspaces After Contact Work state. You can type only one Not Ready state ID.</p> <p>When the agent state in Salesforce changes to Not Ready and the Not Ready state ID matches the ID entered in the Omnichannel After Contact Work Status Id field, the agent state in Avaya Workspaces changes to After Contact Work.</p>
Omnichannel Not Ready Reason Code	<p>The option to indicate and label the Avaya Workspaces Not Ready reason code. In Complimentary mode, when the agent state in Salesforce changes to Ready, the agent state in Avaya Workspaces changes to the Not Ready state associated with the entered reason code.</p> <p>If you do not associate Salesforce Not Ready state IDs with the Avaya Workspaces Not Ready reason codes using the Not Ready Reason Code Map with Omnichannel 1-20 fields, Avaya Workspaces uses the reason code entered in the Omnichannel Not Ready Reason Code field as the default one.</p> <p>You must enter an Avaya Workspaces Not Ready reason code in the following format: <code><reason code number = reason code label></code>, where <code><reason code number></code> is the number of the required Not Ready reason code in Avaya Workspaces, and <code><reason code label></code> is the label that Avaya Workspaces displays for this reason code.</p> <p>For example, you can type <code>21 = Digital Not Ready</code>. If you are using Complimentary mode, when the agent state in Salesforce changes to Ready, the agent state in Avaya Workspaces changes to the Not Ready state associated with reason code 21 and the reason code is labeled Digital Not Ready.</p>
Customer Journey Button Enabled (Y/N)	<p>The option to enable agents to view Customer Journey.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can click  and view Customer Journey. • N: Avaya Workspaces for CRM does not display .

Table continues...

Name	Description
Toggle Channels Enabled (Y/N/P)	<p>The option to enable agents to view the list of channels using the toggle button (>). If you enable this feature, agents can click the toggle button at the bottom of the Avaya Workspaces for CRM softphone to view the list of channels and their availability state.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays the toggle button, which agents can click to expand the list of channels. If one of the channels is unavailable, the toggle button is yellow, and the channel icon in the list of channels is also displayed in yellow. The agent state for unavailable channels changes to Not Ready. • N: Avaya Workspaces for CRM does not display the toggle button. The list of channels is displayed in the expanded view by default. • P (Present): Avaya Workspaces for CRM displays the toggle button, which agents can click to expand the list of channels. If one of the channels is unavailable, Avaya Workspaces for CRM automatically expands the list of channels, and the channel icon is displayed in yellow. The agent state for unavailable channels changes to Not Ready.
Enable Notifications? (Y/L/T/N)	<p>The option to enable Avaya Workspaces for CRM to display notifications to agents.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can view the notification list and toast (pop-up) notifications. • L (List): Agents can only view the notification list. • T (Toast): Agents can only view pop-up notifications. • N: Agents cannot view notifications.
Set Agent State to Not Ready on RONA?	<p>The option to automatically change the agent state to Not Ready when Redirection On No Answer (RONA) occurs.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agent state changes to Not Ready when RONA occurs. You can enable Avaya Workspaces for CRM to use a reason code when switching the agent state to Not Ready. To indicate a reason code, type <code>Y = number</code>, where <code>number</code> is a reason code number. For example, you can type <code>Y = 1</code>. • N: Agent state does not change to Not Ready when RONA occurs.

Table continues...

Name	Description
Voicemail Number	<p>The phone number that Avaya Workspaces for CRM uses to access voicemail messages.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • If you leave this field empty, Avaya Workspaces for CRM disables the voicemail feature. • If you type a number, Avaya Workspaces for CRM uses this number to enable the voicemail feature. Agents can call the configured number to listen to the messages left by customers.
Enable Advanced Customer History?	<p>The option to enable agents to view advanced customer history. The advanced customer history layout is similar to the standard Avaya Workspaces chat layout, with each message displayed in a separate box. The default customer history displays messages using line separators.</p> <p> Tip:</p> <p>If the agents encounter errors when viewing advanced customer history, set this option to N.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can view advanced customer history. • N: Agents cannot view advanced customer history.
Debounce Time (seconds)	<p>The option to indicate a time interval in seconds for disabling Avaya Workspaces for CRM softphone buttons after an agent clicks a button. For example, if you type a value of 5, agents cannot click any buttons in the Avaya Workspaces for CRM softphone for five seconds after clicking Alerting to accept a digital interaction. If the agent completes the action successfully, Avaya Workspaces for CRM does not disable the buttons.</p>

Related links

[Configuring your call center](#) on page 14

Activity Options field descriptions

Name	Description
Agent ID Field API Name	<p>The option to define the Activity Custom Field API Name that saves the agent ID.</p> <p>For example, you can type AgentId__c.</p>
Called Field API Name	<p>The option used for voice interactions to define the Activity Custom Field API Name that saves the called number or Digital Interaction Sender (DNIS).</p> <p>For example, you can type Called__c.</p>

Table continues...

Name	Description
Caller Field API Name	<p>The option used for voice interactions to define the Activity Custom Field API Name that saves the caller ID. This is also called Automatic Number Identification (ANI).</p> <p>For example, you can type <code>Caller__c</code>.</p>
Consult Field API Name	<p>The option to define the Activity Custom Field API Name that saves the consult type.</p> <p>For example, you can type <code>Consult__c</code>.</p>
Custom Digital Activity Field 1-3	<p>The option to define a custom field for digital interactions Avaya Workspaces for CRM displays on interaction cards in the Activity Details section. You can type an API associated with the required custom field in Salesforce. For example, you can type <code>Product__c</code>.</p> <p>Avaya Workspaces for CRM uses the API to create the custom field in the Salesforce logs. If the API does not exist, Avaya Workspaces for CRM does not save logs for this field.</p>
Custom Voice Activity Field 1-3	<p>The option to define a custom field for voice interactions that Avaya Workspaces for CRM displays on interaction cards in the Activity Details section. You can type an API associated with the required custom field in Salesforce. For example, you can type <code>Product__c</code>.</p> <p>Avaya Workspaces for CRM uses the API to create the custom field in the Salesforce logs. If the API does not exist, Avaya Workspaces for CRM does not save logs for this field.</p>
Default Digital Activity Subject	<p>The default value that Avaya Workspaces for CRM displays in the Subject field of digital interactions.</p>
Default Voice Activity Subject	<p>The default value that Avaya Workspaces for CRM displays in the Subject field of voice interactions.</p>
Enable Activity on Incomplete Interactions (Y/N)	<p>The option to enable Avaya Workspaces for CRM to create logs for incomplete interactions.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM creates logs for incomplete interactions. • N: Avaya Workspaces for CRM does not create logs for incomplete interactions.
From Field API Name	<p>The option used for digital interactions to define the Activity Custom Field API Name that saves the DNIS.</p> <p>For example, you can type <code>From__c</code>.</p>

Table continues...

Name	Description
Handle Click-To-Dial from Task (N/R/U/C)	<p>The option to use information from the Task page to create a call log when an agent initiates a click-to-dial call.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • N (No): When an agent initiates a click-to-dial call from the Task page, Avaya Workspaces for CRM does not use the information on the Task page to create a call log. • R (Related): When an agent initiates a click-to-dial call, Avaya Workspaces for CRM uses related information on the page to create a call log. • U (Updated): When an agent initiates a click-to-dial call, Avaya Workspaces for CRM uses the information on the Task page to create a call log. The status of the call in the call log does not change. • C (Completed): When an agent initiates a click-to-dial call, Avaya Workspaces for CRM uses the information on the Task page to create a call log. The status of the call in the call log changes to Completed.
High Velocity sales categories list field name	The name of the Custom Activity field that displays a list of High-Velocity Sales categories for a call.
Interaction History Size	The number of interactions Avaya Workspaces for CRM saves on the History widget. You can type a number from 0 to 20.
Log Data (1-2)	<p>The option to enable the Log Data API Name to save values from attributes and engagement parameters. You can add multiple log data fields separated by a semicolon. The required format for an attribute is: <code>CRMCustomActivityField=AttributeKey</code>. The required format for an engagement parameter is: <code>CRMCustomActivityField=EngagementParameterKey</code>. For example, in the Log Data 1 field, type <code>Language__c=Language</code> to assign the language the customer selects during an interaction to an attribute.</p>

Table continues...

Name	Description
Make Activity Related Data Sticky (Y/X/N)	<p>The option to determine the value selected in the Name and Related To fields.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM selects the first Salesforce object that an agent opens after accepting the interaction. The agent can change the value in the Name and Related To fields manually. Avaya Workspaces for CRM saves the last selected object to the interaction log. • X: Avaya Workspaces for CRM does not select any values in the Name and Related To fields. The agent must select the value manually. • N: Avaya Workspaces for CRM selects the last Salesforce object that an agent opens after accepting an interaction. The agent can select the value manually. When the agent opens a new Salesforce object, Avaya Workspaces for CRM updates the value in the Name and Related To fields.
Prioritize Related to (Y/N)	<p>The option to determine whether the interaction logs must contain the Salesforce object from the Name field or Related To field in case the Name field contains the Lead object.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: If the Name field contains the Lead object, Avaya Workspaces for CRM saves the object from the Related To field to the interaction log and discards the object from the Name field. • N: If the Name field contains the Lead object, Avaya Workspaces for CRM saves the object from the Name field to the interaction log and discards the object from the Related To field.
Queue Field API Name	<p>The option to define the queue name. If the field is empty, Avaya Workspaces for CRM ignores it and does not save any data.</p> <p>For example, you can type <code>Queue__c</code>.</p>

Table continues...

Name	Description
<p>Voice/Email/Chat/Messaging Header Labels</p>	<p>The option to display additional information on the header of an incoming interaction card in Alerting, Active and ACW states. You can use engagement parameters, attributes, and intrinsics to display additional information. You can configure voice and digital channels separately.</p> <p>You choose a channel type to display additional information and type a string in the respective field in the following formats:</p> <ul style="list-style-type: none"> • <code>attr:LabelToDisplay=AttributeKey</code> • <code>param:LabelToDisplay=EngagementParameterKey</code> • <code>intrinsic:LabelToDisplay=TOPIC_NAME</code> <p>For example, in the Voice Header Labels field, type <code>param:LabelToDisplay=customerType</code> to display the value for the <code>customerType</code> key received from engagement parameters on the header of an incoming voice interaction card.</p> <p>In the Voice Header Labels field, type <code>attr:LabelToDisplay=Language</code> to display the value for the <code>Language</code> key received from attributes on the header of an incoming voice interaction card.</p> <p>In the Voice Header Labels field, type <code>intrinsic:LabelToDisplay=TOPIC_NAME</code> to display the value for the <code>TOPIC_NAME</code> key received from intrinsics on the header of an incoming voice interaction card.</p>
<p>Show Activity Details? (Y/N/S/A)</p>	<p>The option to enable Avaya Workspaces for CRM to display the Activity Details section to agents.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can view the Activity Details section on interaction cards. When an agent receives an interaction card, Avaya Workspaces for CRM displays the Activity Details section in the collapsed mode. The agent can click the Activity Details section to expand it. • S (Show fields initially): Agents can view the Activity Details section on interaction cards. When an agent receives an interaction card, Avaya Workspaces for CRM displays the Activity Details section in the expanded mode. The agent can click the Activity Details section to collapse it. • A (Always open): Agents can view the Activity Details section on interaction cards. When an agent receives an interaction card, Avaya Workspaces for CRM displays the Activity Details section in the expanded mode. The agent cannot collapse the Activity Details section. • N: Avaya Workspaces for CRM creates logs, but agents cannot view or change them.

Table continues...

Name	Description
Show Comments? (Y/N)	The option to enable Avaya Workspaces for CRM to display the Comments field on interaction cards in the Activity Details section. The values are the following: <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays the Comments field. • N: Avaya Workspaces for CRM does not display the Comments field.
Show Name (Y/N)	The option to enable Avaya Workspaces for CRM to display the Name field on interaction cards in the Activity Details section. The values are the following: <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays the Name field. • N: Avaya Workspaces for CRM does not display the Name field.
Show Related To? (Y/N)	The option to enable Avaya Workspaces for CRM to display the Related To field on interaction cards in the Activity Details section. The values are the following: <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays the Related To field on interaction cards in the Activity Details section. • N: Avaya Workspaces for CRM does not display the Related To field on interaction cards in the Activity Details section.
Start Time Field API Name	The option to define the API Name of the Start Time field that saves the start time of interactions. For example, you can type <code>Call_Start__c</code> .
To Field API Name	The option to define the Activity Custom Field API Name that saves the digital interaction recipient. For example, you can type <code>To__c</code> .
Activity Log Enabled (Y/N/A/E)	The option to enable Avaya Workspaces for CRM to create call logs. The values are the following: <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM creates logs for all calls. • N: Avaya Workspaces for CRM does not create logs for calls. • A (ACD): Avaya Workspaces for CRM creates logs only for ACD calls. • E (External): Avaya Workspaces for CRM creates logs only for inbound and outbound external calls.

Related links

[Configuring your call center](#) on page 14

Screen Pop Options field descriptions

Avaya Workspaces uses the Inline Frame element for the page that the screenpop application displays. When Avaya Workspaces uses the `<iframe>` syntax to display the website, the cookies from the embedded content are considered third-party cookies.

Name	Description
Pop on ANI? (Y/N)	<p>The option to enable screen pops for ANI with the caller's phone number.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays screen pops for ANI. • N: Avaya Workspaces for CRM does not display screen pops for ANI.
POP on DNIS? (Y/N)	<p>The option to enable screen pops for DNIS with the called number.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays screen pops for DNIS. • N: Avaya Workspaces for CRM does not display screen pops for DNIS.
Screen pop on consult or completed conference/ transfer (C/N)	<p>The option to enable Avaya Workspaces for CRM to display screen pops to conference and transfer recipients. Conference and transfer recipients can view screen pops when they receive consultative calls, or when Avaya Workspaces for CRM completes a conference or transfer.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • C (Completed): Avaya Workspaces for CRM displays screen pops to conference and transfer recipients when a transfer or conference is completed. This is the default option. • N: Avaya Workspaces for CRM does not display screen pops to transfer, conference, and consultative call recipients.
International ANI search? (Y/N)	<p>The option to enable Avaya Workspaces for CRM to perform an ANI search using the E.164 format.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM searches for ANI numbers using the E.164 format. • N: Avaya Workspaces for CRM does not search for ANI numbers using the E.164 format.
Suppress Screen Pop (Y/N)	<p>The option to disable screen pops for interactions.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM does not display screen pops for interactions. • N: Avaya Workspaces for CRM displays screen pops for interactions.

Table continues...

Name	Description
Wait for media before performing screenpop (Y/N)	<p>The option to display the customer details in the screen pop.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • N: When an agent receives an interaction, the screen pop does not display the customer details. Avaya Workspaces for CRM searches for the information associated with this customer in Salesforce using the customer's email. • Y: When an agent receives an interaction, the screen pop displays the customer details. Avaya Workspaces for CRM searches for the information associated with this customer in Salesforce using the customer data collected by the chat initiation form. The information collected by the chat initiation form can include the customer's name and phone number.
Custom Parameter (1-10)	<p>The option to do one or more of the following actions:</p> <ul style="list-style-type: none"> • Display the customer information in the Interaction Details section • Display a screen pop or initiate a global search on the CRM • Display a screen pop based on the object ID • Replace the default ANI and DNIS values with the new values
Advanced Pop (1 to 10)	<p>The option to define advanced screen pop options for attributes and engagement parameters.</p> <p>As a Salesforce administrator, you can create a Visualforce page, custom flows, and custom Lightning components. Use the Advanced Pop fields to define Avaya call-related data for this custom content.</p> <p>In each Advanced Pop field, you can type multiple attribute keys and engagement parameter keys separated by semicolons. For example, in the Advanced Pop 1 field, type <code>attr:Language; attr:Department; param:CustomerType</code>.</p> <p>For additional information on the data options, see Avaya Experience Platform™ (On-Prem + Connect).</p>
Pop To Lightning Component Class Name	<p>The option to indicate the name of Lightning Component Class that Avaya Workspaces for CRM uses to get information about the required Salesforce Lightning Component.</p>

Table continues...

Name	Description
Screen Pop Code Order	<p>The option to define the screen pop priority based on the Salesforce object ID value.</p> <p>Each object has a specific object ID or prefix, which consists of three characters. For example, 001 is Account, 003 is Contact, 006 is Opportunity, and 00T is Task. For a complete list, see https://www.salesforceben.com/salesforce-object-key-prefix-list/.</p> <p>If the order you enter in this field is 003, 006, 001 and the search results return an Account (001) and Opportunity (006), the screen pop only displays the Opportunity. If you leave this field blank, multiple match settings are used.</p>

Related links

- [Configuring your call center](#) on page 14
- [Advanced screen pop data: Custom Visualforce page](#) on page 36
- [Advanced screen pop data: Custom Flows](#) on page 37
- [Advanced screen pop data: Custom Lightning components](#) on page 37
- [Custom parameter use cases](#) on page 146

Advanced screen pop data: Custom Visualforce page

You can create a custom Visualforce page in Salesforce. For more information about Visualforce Page Component, see [Visualforce Page Component](#) in the Salesforce documentation.

Data options

Avaya Workspaces for CRM can send call-related data of Avaya to your Salesforce Visualforce page for multiple events. The following list shows the data options:

- AgentID
- ANI
- Caller Name
- Caller Number
- Consult
- DNIS
- End Time
- Prompted Digits
- Skill ID
- Skill Name
- Start Date
- Start Time
- Topic ID
- Topic Name

- UCID
- UUI
- Data in the Advanced Pop (1-10) fields

Related links

[Screen Pop Options field descriptions](#) on page 33

Advanced screen pop data: Custom Flows

You can create custom Flows in Salesforce. For more information about custom Flows, see [Flow \(Experience Builder Component\)](#) in the Salesforce documentation.

Data options

Avaya Workspaces for CRM can send call-related data of Avaya to your Salesforce custom Flows for multiple events. The following list shows the data options:

- AgentID
- ANI
- Caller Name
- Caller Number
- Consult
- DNIS
- End Time
- Prompted Digits
- Skill ID
- Skill Name
- Start Date
- Start Time
- Topic ID
- Topic Name
- UCID
- UUI
- Data in the Advanced Pop (1-10) fields

Related links

[Screen Pop Options field descriptions](#) on page 33

Advanced screen pop data: Custom Lightning components

You can create Custom Lightning Components in Salesforce. For more information about Custom Lightning Components, see [Custom Lightning Components](#) in the Salesforce documentation.

Data options

Avaya Workspaces for CRM can send call-related data of Avaya to your Salesforce Lightning components for multiple events. The following table lists the data options for each event type:

Incoming and Answer events	Outbound events	Release events
<ul style="list-style-type: none"> • Caller (ANI) • Called (DNIS) • Consult • Caller Name • Start Date • Start Time • Topic ID • Topic Name • UUI • Call ID • Data in the Advanced Pop 1-10 fields 	<ul style="list-style-type: none"> • Caller (ANI) • Called (DNIS) • Consult • Work Request ID • Data in the Advanced Pop 1-10 fields 	<ul style="list-style-type: none"> • Caller (ANI) • Called (DNIS) • Consult • Caller Name • Start Date • Start Time • Topic ID • Topic Name • UUI • Call ID • Data in the Advanced Pop 1-10 fields • Agent ID • Call Duration • Call Log Comments • Call Log Subject • Call Log Result/Disposition Code • Call Type • Name • Related To • Release Type

Related links

[Screen Pop Options field descriptions](#) on page 33

Server Configuration field descriptions

Name	Description
Host URL	The Fully Qualified Domain Name (FQDN) of the server hostname indicates the server on which the Avaya Workspaces for CRM softphone is installed. Obtain the FQDN from Avaya Support.

Table continues...

Name	Description
Use local session sharing (N)	<p>The option to enable support for multiple tabs.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • N: Support for multiple tabs is disabled. Agents open digital and voice interactions in the same tab.

Related links

[Configuring your call center](#) on page 14


Reason Codes Enabled field descriptions

Name	Description
Not Ready Reason Enabled? (Y/N/Z)	<p>The option to enable agents to use Not Ready reason codes.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can click Not Ready and select the required Not Ready reason code. • N: Agents can click Not Ready to switch to the Not Ready state, but they cannot select Not Ready reason codes. • Z (Zero): When agents click Not Ready, Avaya Workspaces for CRM only displays the Not Ready reason code of zero.
Disposition Codes Enabled? (Y/N)	<p>The option to enable agents to use disposition codes.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can click More on the interaction card and select the appropriate disposition code. • N: Agents cannot select disposition codes.

Related links

[Configuring your call center](#) on page 14

Not Ready Reason Codes Map with Omnichannel field descriptions

Name	Description
<p>Not Ready Reason Code Map with Omnichannel 1-20</p>	<p>The option to associate the Salesforce Not Ready state ID with the Avaya Workspaces Not Ready reason code. Enter a value in the following format: <Avaya Workspaces Not Ready reason code> = <Salesforce Not Ready state ID>, where <Avaya Workspaces Not Ready reason code> is the number for the required Not Ready reason code in Avaya Workspaces, and <Salesforce Not Ready state ID> is the required Salesforce Not Ready state ID.</p> <p>For example, you can type 1=0N50S000000000Cj. In Synchronized mode, when the agent state in Salesforce changes to Not Ready, and the Not Ready state ID is 0N50S000000000Cj, the agent state in Avaya Workspaces changes to the Not Ready state associated with reason code 1.</p> <p> Note:</p> <p>Ensure that you provide the Salesforce Not Ready state IDs in the Omnichannel Not Ready Status Id field before you associate them with the Avaya Workspaces Not Ready reason codes using the Not Ready Reason Code Map with Omnichannel fields.</p>

Related links

[Configuring your call center](#) on page 14

Label Options field descriptions

Name	Description
Connected Ready Not Ready Go Ready Go Not Ready After Contact Work After Contact Work (Extended) Pending Not Ready Pending After Contact Work Disposition Codes Cancel Activate Activate Agent Start Work To Start Work Start Work Pending Finish Work Finish Work Pending Sign Out Force Logout Offline Show Offline Agents Hide Offline Agents	<p>You can change the name of a label used in Avaya Workspaces for CRM if your call center uses a different label. For example, if your call center uses the Available agent state label instead of the Ready agent state label, you can type <code>Available</code> in the Ready field. Avaya Workspaces for CRM displays the Available agent state label instead of the Ready agent state label when an agent selects this agent state.</p>

Related links






[Configuring your call center](#) on page 14

Configuring a softphone layout





About this task

Configure a softphone layout to define which call-related Salesforce fields and objects Avaya Workspaces for CRM displays to agents. To configure the softphone layout, you must create a softphone layout definition. Configure the softphone layout for inbound, outbound, and internal calls within the softphone layout definition. You can define the order in which Avaya Workspaces for CRM displays call-related Salesforce fields and objects to agents.

Procedure

1. At the top of the Salesforce home page, click .
2. In the pop-up window, click **Setup**.
3. On the Setup page, go to **Feature Settings > Service > Call Center > Softphone Layouts**.
4. Click **New**.
5. In **Name**, type a name for your softphone layout definition.
6. **(Optional)** To make this the default softphone layout definition, select **Is Default Layout**.
7. In **Select Call Type**, select **Internal**, **Inbound**, or **Outbound**.
8. To configure the softphone layout for the call-related fields, in the Display these call-related fields section, click **Edit** and do one of the following:
 - To add a field to the softphone layout, in the Available section, select the required field and click .
 - To remove a field from the softphone layout, in the Selections section, select the required field and click .
 - To change the order in which Avaya Workspaces for Salesforce displays a field, in the Selections section, select the required field and click  or .

Avaya Workspaces for CRM displays a call-related field in the agent's softphone if a valid value for this field is available. For example, if you add the **Caller ID** field to the softphone layout for outbound calls, Avaya Workspaces for CRM does not display this field.

9. To configure the softphone layout for the call-related objects, in the Display these salesforce.com objects section, click **Add / Remove objects** and do one of the following:
 - To add an object to the softphone layout, in the Available section, select the required object and click .
 - To remove an object from the softphone layout, in the Selections section, select the required object and click .
 - To change the order in which Avaya Workspaces for CRM displays an object, in the Selections section, select the required field and click  or .

10. To configure the softphone layout for instances where Avaya Workspaces for CRM finds a single record for the required object, in the If single <Object> found, display sections, click **Edit** and do one of the following:
 - To add a field to the softphone layout, in the Available section, select the required field and click ►.
 - To remove a field from the softphone layout, in the Selections section, select the required field and click ◀.
 - To change the order in which Avaya Workspaces for CRM displays a field, in the Selections section, select the required field and click ▲ or ▼.
11. To configure the softphone layout for the remaining call types, repeat steps 7 to 10.
12. At the top of the Softphone Layouts page, click **Save**.

Related links

[Configuring Softphone Layouts in Salesforce](#)

Configuring screen pop settings for inbound calls

About this task


While configuring the softphone layout for inbound calls, you can specify the pages that Avaya Workspaces for CRM displays when the details of an inbound call match and do not match the existing records in Salesforce.

Avaya Workspaces uses the Inline Frame element for the page that the screenpop application displays. When Avaya Workspaces uses the <iframe> syntax to display the website, the cookies from the embedded content are considered third-party cookies.

Before you begin

Create a softphone layout definition for the inbound call type.

Procedure

1. At the top of the Salesforce home page, click .
2. In the pop-up window, click **Setup**.
3. On the Setup page, go to **Feature Settings > Service > Call Center > Softphone Layouts**.

Salesforce displays the Softphone Layouts page.

4. To edit an existing softphone layout definition, click **Edit** next to it.

You can configure screen pop settings for the inbound call type softphone layout.

5. In the Screen Pop Settings section, click **Screen pops open within section** and select one of the following:
 - **Existing browser window:** Avaya Workspaces for CRM displays screen pops in the opened browser windows.
 - **New browser window or tab:** Avaya Workspaces for CRM displays screen pops in the new browser windows or tabs.
6. Click **No matching records** and select one of the following:
 - **Don't pop any screen:** Avaya Workspaces for CRM does not display screen pops when the details of an inbound call do not match the existing Salesforce records.
 - **Pop to new:** You can select a new record page that Avaya Workspaces for CRM displays when the details of an inbound call do not match the existing Salesforce records.
 - **Pop to Visualforce page:** You can specify a Visualforce page that Avaya Workspaces for CRM displays when the details of an inbound call do not match the existing Salesforce records. The CTI adapter passes data from the call to the Visualforce page using a URL. The data can include ANI (the Caller ID) and DNIS (the number that the caller dialed).
 - **Pop to flow:** You can select a screen flow that Avaya Workspaces for CRM displays when the details of an inbound call do not match the existing Salesforce records. You can select active screen flows.
7. Click **Single-matching record** and select one of the following:
 - **Don't pop any screen:** Avaya Workspaces for CRM does not display screen pops when the details of an inbound call match one existing Salesforce record.
 - **Pop to new:** You can select a new record page that Avaya Workspaces for CRM displays when the details of an inbound call match one existing Salesforce record.
 - **Pop to Visualforce page:** You can specify a Visualforce page that Avaya Workspaces for CRM displays when the details of an inbound call match one existing Salesforce record. The CTI adapter passes data from the call to the Visualforce page using a URL. The data can include ANI (the Caller ID) and DNIS (the number that the caller dialed).
 - **Pop to flow:** You can select a screen flow that Avaya Workspaces for CRM displays when the details of an inbound call match one existing Salesforce record. You can select active screen flows.
8. Click **Multiple-matching record** and select one of the following:
 - **Don't pop any screen:** Avaya Workspaces for CRM does not display screen pops when the details of an inbound call match more than one existing Salesforce record.
 - **Pop to new:** You can select a new record page that Avaya Workspaces for CRM displays when the details of an inbound call match more than one existing Salesforce record.
 - **Pop to Visualforce page:** You can specify a Visualforce page that Avaya Workspaces for CRM displays when the details of an inbound call match more than one existing

Salesforce record. The CTI adapter passes data from the call to the Visualforce page using a URL. The data can include ANI (the Caller ID) and DNIS (the number that the caller dialed).

- **Pop to flow:** You can select a screen flow that Avaya Workspaces for CRM displays when the details of an inbound call match more than one existing Salesforce record. You can select active screen flows.

9. At the top of the Softphone Layout Edit page, click **Save**.

Related links

[Configuring a softphone layout](#) on page 42

[Configuring Screen Pop Settings in Salesforce](#)

SSO for Salesforce

Single sign-on (SSO) is an authentication scheme that enables users to log in with a single ID to multiple independent software applications. With SSO, agents can log in to Avaya Workspaces for CRM using the same username and password that they use for Salesforce. To enable SSO, create a metadata file in Salesforce and upload it to Avaya Experience Platform™ Public Cloud. In addition, ensure that the domain name that you are using is not blocked by Avaya Experience Platform™ Public Cloud.

To ensure privacy between the identity provider and Salesforce, SSO uses the Security Assertion Markup Language (SAML) v2 protocol. SAML is an open standard for exchanging authentication and authorization data between parties.

Related links

[Avaya Workspaces for CRM integration with Salesforce overview](#) on page 9

[Checklist for enabling SSO in Salesforce](#) on page 45

[Creating a metadata file in Salesforce](#) on page 46

[Adding users in Salesforce](#) on page 48

[Uploading the metadata file to Avaya Experience Platform Public Cloud](#) on page 49

[Allowlisting the Salesforce domain name](#) on page 50

[Creating users for Salesforce SSO](#) on page 51

Checklist for enabling SSO in Salesforce

Perform the following SSO configuration tasks:


No.	Task	Description	✓
1.	Create a metadata file in Salesforce.	Configure basic information and enable SAML before downloading the metadata file to your computer.	
2.	Add users in Salesforce.	Add each SSO user to Salesforce. As indicated later in this checklist, you will also need to create users for Salesforce SSO in Avaya Experience Platform™ Public Cloud.	
3.	Upload the metadata file to Avaya Experience Platform™ Public Cloud.	Add the metadata file from Salesforce to the Avaya Experience Platform™ Public Cloud element inventory.	
4.	Add the Salesforce domain name to the Avaya Experience Platform™ Public Cloud allowlist.	Add the Salesforce domain as an allowlisted domain. Ensure that messages coming from Salesforce are not blocked by Avaya Experience Platform™ Public Cloud. This is required to create users.	
5..	Create SSO users in Avaya Experience Platform™ Public Cloud.	When creating users, ensure that their login ID matches their Salesforce login ID.	

Related links

[SSO for Salesforce](#) on page 45

Creating a metadata file in Salesforce

Procedure

1. At the top of the Salesforce home page, click .
2. In the pop-up window, click **Setup**.
3. Go to **Apps > App Manager**.
Salesforce displays the Lightning Experience App Manager page.
4. Click **New Connected App**.
5. In the Basic Information section, fill in the fields.
6. In the Web App Settings section, select the **Enable SAML** check box and fill in the fields.
7. Click **Save**.
Salesforce displays the Lightning Experience App Manager page.
8. Click the new connected application in the list and click **Manage**.
9. In the SAML Login Information section, click **Download Metadata**.

Salesforce downloads the metadata associated with the new connection application for SSO.

Related links

[SSO for Salesforce](#) on page 45

[New Connected App page descriptions](#) on page 47

[Configuring Apps Manager Salesforce](#)

New Connected App page descriptions

Basic Information field descriptions

Name	Description
Connected App Name	The connected application name for the SSO feature. A connected application consists of a collection of configuration settings in Salesforce.
API Name	The name of the API that provides the SSO feature.
Contact Email	The contact email address for the connected application.
Contact Phone	The contact phone number for the connected application.
Logo Image URL	This setting is not applicable.
Icon URL	This setting is not applicable.
Info URL	This setting is not applicable.

Web App Settings field descriptions

Name	Description
Start URL	This setting is not applicable. Leave this field empty.
Enable SAML	Select this check box to enable SAML for SSO. The remaining fields are displayed after you select this check box.
Entity ID	Example: <code>https://<your_ccaas_domain>/auth/realms/<tenant ID></code> Make a note of this value.
ACS URL	This URL is also the Avaya Experience Platform™ Public Cloud tenant URL, followed by the pattern: <code>https://<your_ccaas_domain>/auth/realms/<tenant ID>/broker/<yourSSOappName>/endpoint</code> Make a note of this value. You need it when you add the SAML server to the Avaya Experience Platform™ Public Cloud element inventory
Enable Single Logout	The option to log users out of Avaya Workspaces for CRM when they log out of Salesforce. Example: <code>https://<your_Salesforce_production_URL>/services/auth/idp/saml2/logout</code>

Table continues...

Name	Description
Subject Type	Drop-down list of possible login credentials. In a typical deployment, this is Username.
Name ID Format	The format for the username. You can select this from the drop-down list. In a typical deployment, this is <code>urn:oasis:names:tc:SAML:2.0:nameid-format:persistent</code> .
Issuer	The address of your Salesforce production URL. Example: <code>https://<your_Salesforce_production_URL>.lightning.force.com</code>
IdP Certificate	The name of the identity provider certificate. Select this from the drop-down list.
Verify Request Signature	The check box to enable an additional level of security verification.
Encrypt SAML Response	The check box to enable an additional level of security encryption.
Signing Algorithm for SAML Messages	Drop-down list to define the format for SAML messages. In a typical deployment, this is SHA1.

For information about other fields, see <https://help.salesforce.com/>.

Related links


[Creating a metadata file in Salesforce](#) on page 46

Adding users in Salesforce

Before you begin

Create a metadata file in Salesforce.

Procedure

1. At the top of the Salesforce home page, click .
2. In the pop-up window, click **Setup**.
3. Go to **Apps > App Manager**.
Salesforce displays the Lightning Experience App Manager page.
4. Click the new connected application in the list and then click **Manage**.
5. In the Profiles section, click **Manage Profiles**.
6. Select the profiles that you want to access SSO.

Related links

[SSO for Salesforce](#) on page 45

[Configuring users in Salesforce](#)

Uploading the metadata file to Avaya Experience Platform™ Public Cloud

Before you begin

Log in to Application Center Administration as an account administrator.

Procedure

1. In the navigation tree, click **Element Inventory**.
2. On the Elements page, click **New > SAML**.
3. On the SAML Server page, fill in the fields.
4. Click **Select XML file** and locate the metadata file that you created in Salesforce.
5. Click **Upload**.

Application Center Administration uploads the file and displays a list of options.

6. Select the following:
 - **HTTP-POST Binding for AuthnRequest:** Controls the SAML binding when requesting authentication from an external identity provider (IDP). If you set it to OFF, Keycloak uses Redirect Binding.
 - **HTTP-POST Binding Logout:** Specifies the SAML logout endpoint. It is an optional field. If your SAML IDP publishes an IDP entity descriptor, the value of this field is specified there.
 - **HTTP-POST Binding Response:** Controls the SAML binding in response to any SAML requests sent by an external IDP. If you set it to OFF, Keycloak uses Redirect Binding.
7. Click **Save**.

Related links

[SSO for Salesforce](#) on page 45

[SAML Server field descriptions](#) on page 49

[Configuring Apps Manager Salesforce](#)

SAML Server field descriptions

Name	Description
Name	The name, without spaces, that you used in the ACS URL field in the Web App Settings section of the Salesforce configuration. This is the name that appears before <code>endpoint</code> . For example, <code>https://sandbox.avayacloud.com/auth/realms/ULEENI/broker/sfdcso/endpoint</code> . In this example, the name is <code>sfdcso</code> .
Display Name	The name that Avaya Workspaces for CRM displays on the Login page.
Select XML file	Click to select the metadata file that you created in Salesforce.

Table continues...

Name	Description
Upload	Click to upload the metadata file that you created in Salesforce to Avaya Experience Platform™ Public Cloud.

Related links


[Uploading the metadata file to Avaya Experience Platform Public Cloud](#) on page 49

Allowlisting the Salesforce domain name

Before you begin

Log in to Application Center Administration as an account administrator.

Procedure

1. In the navigation tree, click **Accounts**.
2. On the Account page, click  next to your account and then click **Edit**.
3. Fill in the fields.
4. Click **Save**.

Related links

[SSO for Salesforce](#) on page 45

[Account page field descriptions](#) on page 50

Account page field descriptions

Field	Description
Name	The name of the account. For example, you can type XYZ.
Login Domain(s)	The login domains associated with the Salesforce account that you want to allowlist. For example, you can type xyz.com and press Enter.
Default Login Domain	The default domain for the account.
Emergency Email Address(es)	The email addresses to send a notification about emergency calling.
Description	The description for the account.
Profiles	The profile to assign to the account. You can assign multiple profiles to an account.

Address

Use this section to add an emergency location for your account. After adding an emergency location, you can assign it to existing users. Application Center Administration automatically assigns the default emergency location to all new users. You can add a maximum of five emergency locations for one account and set one of them as default.

Administrator

Use this section to add new account administrators or assign the existing users as administrators to your account.

Related links

[Allowlisting the Salesforce domain name](#) on page 50

Creating users for Salesforce SSO

About this task

You can create a test agent and assign queues and attributes to that agent. The agent inherits the attributes of the profile that you assign.

For more information about managing users in Application Center Administration, see *Administering Avaya Experience Platform™ Public Cloud*.

Before you begin

- Log in to Application Center Administration as an account administrator.
- Create a profile associated with your account.

Procedure

1. In the navigation tree, click **User Management > Users**.
2. On the Users page, click **Create User**.
3. On the Users page, fill in the fields.
4. Expand the Membership section and fill in the fields.
5. In the User Features section, fill in the fields.
6. Click **Save**.

Related links

[SSO for Salesforce](#) on page 45

[New User page field descriptions](#) on page 51

[Configuring users in Salesforce](#)

New User page field descriptions

Fields	Description
Account	Select the account or account hierarchy to create a user. By default, the page displays the account hierarchy selected on the Users page. From this Account list, you can change the account or account hierarchy.
First Name	Enter the first name of the user.
Last Name	Enter the last name of the user.
Display Name	Enter the display name of the user.

Table continues...

Fields	Description
Email Address	Enter the email address of the user.
Login ID	Enter the login ID for the user. From the list next to the login ID, select the domain. The login ID you enter must match the login ID for Salesforce. The domain name comes from the account.
Password	Leave this field empty.
Confirm Password	Leave this field empty.
Profile	Select a profile for the user. You must select a profile to enable the Features section. Depending on the profile configuration, different channel options are displayed in the Features section.

Related links

[Creating users for Salesforce SSO](#) on page 51

Chapter 3: Avaya Workspaces for CRM integration with Dynamics 365

Dynamics 365 is a software solution that unites the Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) functionalities. With the Dynamics 365 cloud-based software, you can manage people, processes, and data associated with your company within a single solution divided into multiple applications.

Avaya Workspaces for CRM integration with Dynamics 365 enables agents in your contact center to perform the following actions while using the Dynamics 365 functionality:

- Access the Avaya Workspaces for CRM softphone on the Dynamics 365 platform.
- Handle inbound and outbound customer interactions.
- Make internal calls.

Agents use the Avaya Workspaces for CRM softphone capabilities to communicate with customers and the Dynamics 365 integration to manage the associated Dynamics 365 information. For example, an agent can select a phone number within the Dynamics 365 phone directory and initiate an outgoing voice interaction using the Avaya Workspaces for CRM softphone.

This integration also includes supervisor functionalities. For example, it enables supervisors in your contact center to monitor agents and intervene with customers. Within the Avaya Workspaces for CRM softphone, supervisors can use the supervisor dashboard to view the currently active agents and perform supervisor tasks, such as observing interactions, coaching agents, and barging into interactions.

For more information about how agents and supervisors can use the Avaya Workspaces for CRM softphone within Dynamics 365, see *Using Avaya Experience Platform™ Public Cloud Avaya Workspaces for CRM*.

As an administrator, you must perform the tasks required to integrate Avaya Workspaces for CRM with Dynamics 365. You can create a Power App, within which Dynamics 365 displays the Avaya Workspaces for CRM softphone, or use an existing Power App. Ensure that you install the Channel Integration Framework app that enables you to integrate external solutions to Dynamics 365 before you start integrating Avaya Workspaces for CRM with it. When completing the integration, you can configure your contact center properties and manage your agents' experience. For example, you can enable your agents to make call transfers and set up conferences.

This guide describes the Dynamics 365 procedures required for the integration process. For more information about administering Dynamics 365, see <https://docs.microsoft.com/en-us/dynamics365/>.

Related links

- [Checklist for configuring Avaya Workspaces for CRM in Dynamics 365 CIF 1.0](#) on page 54
- [Downloading the CRM configuration file](#) on page 55
- [Importing a solution](#) on page 56
- [Adding the contact center entities to a Power App](#) on page 57
- [Configuring your contact center](#) on page 58
- [Configuring a channel provider in the Channel Integration Framework Power App](#) on page 76
- [SSO for Dynamics 365](#) on page 79
- [Checklist for configuring Avaya Workspaces for CRM in Dynamics 365 CIF 2.0](#) on page 87
- [Creating a new agent experience profile](#) on page 89
- [Creating a CIF provider for the new agent experience profile](#) on page 91
- [Configuring your contact center for CIF 2.0](#) on page 93
- [Creating a table for your contact center logs for ongoing interactions](#) on page 98
- [Testing Avaya Workspaces for Dynamics 365](#)

Checklist for configuring Avaya Workspaces for CRM in Dynamics 365 CIF 1.0

Use the following checklist to ensure that you perform all steps required for successfully configuring the Avaya Workspaces for CRM integration with Dynamics 365 CIF 1.0:

No.	Task	Description	Notes	✓
1.	Import the solution file to Dynamics 365.	You must import the solution file to Dynamics 365 to configure your contact center properties.	You must download the solution file from https://support.avaya.com/ .	
2.	Add the contact center entities to the Power App.	You must add the contact center entities to the Power App to use it for configuring your contact center. After you add the contact center entities, Dynamics 365 displays them within the Power App.	You must create a Power App for your contact center or use an existing Power App to perform this procedure. For more information about creating Power Apps, see the Microsoft documentation.	

Table continues...

No.	Task	Description	Notes	✓
3.	Configure your contact center.	You must configure your contact center using a Power App. Within the Power App, you can configure and change the properties of the Avaya Workspaces for CRM softphone.	When configuring the contact center, you can manage your agents' experience. For example, you can define whether Avaya Workspaces for CRM displays pop-up notifications to agents.	
4.	Configure a channel provider in the Channel Integration Framework Power App.	After configuring your contact center within a Power App, you must use the Channel Integration Framework Power App to configure a channel provider. The channel provider fetches the Avaya Workspaces for CRM softphone from Avaya Experience Platform™ Public Cloud to Dynamics 365.	<p>You must perform the following actions before configuring a channel provider:</p> <ul style="list-style-type: none"> • Configure your contact center within a Power App. • Obtain the URL of the Avaya Experience Platform™ Public Cloud server from Avaya. • Install the Channel Integration Framework Power App. 	

Related links

- [Avaya Workspaces for CRM integration with Dynamics 365](#) on page 53
- [Importing the Solution File to Dynamics 365](#)
- [Adding Contact Center Entities in Dynamics 365](#)
- [Configuring Contact Center in Dynamics 365](#)
- [Configuring Channel Provider in Dynamics 365](#)

Downloading the CRM configuration file

Procedure

1. Go to <https://support.avaya.com> to download the Call Center Definition or Software Package for your CRM.
2. Navigate to **Support for Product > Downloads**.
3. In the **Enter Product Name** field, enter Avaya Experience Platform™ Public Cloud.

A list of available software packages is displayed.

This configuration file is also available on <https://plds.avaya.com/> under the name Experience Platform Workspaces for CRM.

Related links

[Avaya Workspaces for CRM integration with Dynamics 365](#) on page 53

[Importing a solution](#) on page 56

Importing a solution



About this task

Import the solution file that you downloaded from the Avaya Support website to configure your contact center properties. This file contains the configuration tables that you can use to add the required contact center entities to the Power App. The solution file is in ZIP format.

Before you begin

- Create a Power App for your contact center or use an existing Power App. For more information about creating Power Apps, see the Microsoft documentation.

Procedure

1. At the top of the Dynamics 365 home page, click .
2. In the pop-up window, click **Advanced Settings**.
3. At the top of the page, next to **Settings**, click .
4. In the Customization section, click **Solutions**.
Dynamics 365 displays the All Solutions page.
5. At the top of the page, click **Import**.
Dynamics 365 displays the Import Solution window.
6. In the Select Solution Package section, click **Choose file** and select the required file.
7. Click **Next**.
8. In the Post Import Actions section, select **Enable any SDK message processing steps included in the solution**.
9. Click **Import**.
10. At the top of the page, click **Publish All Customizations**.
Dynamics 365 imports the solution file. You can now add contact center entities to the Power App.
11. Download the configuration file from the Avaya Support website.

Related links

[Avaya Workspaces for CRM integration with Dynamics 365](#) on page 53

[Adding the contact center entities to a Power App](#) on page 57

[Downloading the CRM configuration file](#) on page 55

[Importing the Solution File to Dynamics 365](#)

Adding the contact center entities to a Power App

About this task

Add the contact center entities to a Power App. With contact center entities, you can manage your contact center components, such as configuration, interaction logs, and the list of agents that can access the Avaya Workspaces for CRM softphone. You must add the following contact center entities to the Power App:



- **Contact Center:** To manage the contact center configuration.
- **Contact Log:** To manage the contact center logs.
- **Contact:** To manage the customer details.

To add contact center entities to Power Apps, use the Sitemap Designer application. For more information about using the Sitemap Designer application, see the Microsoft documentation.

Before you begin

- Create a Power App for your contact center or use the existing Power App. For more information about creating Power Apps, see the Microsoft documentation.
- Import the solution file that you downloaded from the Avaya Support website to Dynamics 365.

Procedure

1. On the Power Apps page, click  within the Power App configured for your contact center.
2. In the pop-up window, click **OPEN IN APP DESIGNER**.
Dynamics 365 displays the App Designer page.
3. In the Site Map row, click .
4. **(Optional)** To configure an Area for your contact center, click the **New Area** tab and, in **Title**, type a name.
Dynamics 365 uses Areas to enable users to switch between multiple contact center configurations. You can switch between Areas using the toggle icon at the bottom of the Power App page.
5. **(Optional)** To configure a group for your contact center, click the **New Group** tab and, in **Title**, type a name.
Dynamics 365 displays Groups as headers on the Power App page. To add contact center entities to each group, you can use the **New Subarea** tab.
6. To create an entity for managing your contact center configuration, do the following:
 - a. Click the **New Subarea** tab.

- b. In **Entity**, select **Contact Center**.

You can use the created entity to configure your contact center within the Power App.

7. To create an entity for managing your contact center logs, do the following:
 - a. At the top of the Sitemap Designer page, click **Add > Subarea**.
 - b. Click the **New Subarea** tab.
 - c. In **Entity**, select **Contact Log**.

You can use the created entity to manage the interaction logs within the Power App.

8. To create an entity for managing customer details, do the following:
 - a. At the top of the Sitemap Designer page, click **Add > Subarea**.
 - b. Click the **New Subarea** tab.
 - c. In **Entity**, select **Contact**.

You can use the created entity to view and manage customer details.

9. At the top of the Sitemap Designer page, click **Save And Close**.

Dynamics 365 updates the Power App configuration and redirects you to the App Designer page.

10. At the top of the page, click **Publish**.

You can now access the Power App and use it to manage your contact center configuration.

Related links

[Avaya Workspaces for CRM integration with Dynamics 365](#) on page 53

[Importing a solution](#) on page 56

[Adding Contact Center Entities in Dynamics 365](#)

Configuring your contact center

About this task

Configure your contact center to define how Avaya Workspaces for CRM handles incoming and outgoing interactions and manages your agents' experience. For example, you can enable your agents to transfer calls and set up conferences.

Before you begin

- Create a Power App for your contact center or use an existing Power App. For more information about creating Power Apps, see the Microsoft documentation.
- Import the solution file that you downloaded from the Avaya Support website to Dynamics 365.
- Add the contact center entities to your Power App.

Procedure

1. On the Power Apps page, select the Power App configured for your contact center.
2. Select **Contact Centers**.
3. At the top of the page, click **New**.

Dynamics 365 displays the New Contact Center page.

Figure 2: Example of the Dynamics 365 contact center configuration page

4. Fill in the relevant fields.
5. At the top of the page, click **Save & Close**.

Related links

- [Avaya Workspaces for CRM integration with Dynamics 365](#) on page 53
- [General field descriptions](#) on page 60
- [Server Configuration field descriptions](#) on page 60
- [Dialing Options field descriptions](#) on page 60
- [Activity Options field descriptions](#) on page 61
- [Softphone Options field descriptions](#) on page 66
- [Reason Codes Enabled field descriptions](#) on page 73
- [Label Options field descriptions](#) on page 74
- [Location API Settings field descriptions](#) on page 74
- [Screen Pop Options field descriptions](#) on page 75
- [Importing a solution](#) on page 56
- [Adding the contact center entities to a Power App](#) on page 57
- [Configuring Contact Center in Dynamics 365](#)

General field descriptions

Name	Description
Internal Name	The name of your contact center configuration. If you have multiple contact centers, each must have a unique Internal Name. You can type a maximum of 40 alphanumeric characters with no spaces or punctuation marks.
Owner	The name of the Dynamics 365 user who created the contact center configuration. By default, Dynamics 365 fills in this field with your name.
Display Name	The name of your contact center that Dynamics 365 displays on the Active Call Centers page. If you have multiple contact centers, each must have a unique Display Name. You can type a maximum of 1000 UTF-8 characters.

Related links

[Configuring your contact center](#) on page 58

Server Configuration field descriptions

Name	Description
HOST URL	The URL of the Avaya Experience Platform™ Public Cloud server. This field indicates the server on which the Avaya Workspaces for CRM softphone is installed. You must obtain this URL from Avaya Support.
Local session sharing? (N)	The option to enable the multiple tabs support. The values are the following: <ul style="list-style-type: none"> • N: The multiple tabs support is disabled. Agents open digital and voice interactions in the same tab.


Related links

[Configuring your contact center](#) on page 58

Dialing Options field descriptions

Name	Description
Outside Prefix	The prefix that your agents must enter to initiate external calls.
Long Distance Prefix	The prefix that your agents must enter to initiate long-distance calls.
International Prefix	The prefix that your agents must enter to initiate international calls.

Table continues...

Name	Description
Internal Number Length	<p>The length of the internal numbers within your contact center. Avaya Workspaces for CRM uses this value to determine the type of numbers.</p> <p>If the length of a phone number is equal to or less than the entered value, Avaya Workspaces for CRM treats this phone number as an internal number.</p> <p>If the length of a phone number is greater than the entered value, Avaya Workspaces for CRM treats this phone number as an external number.</p> <p> Note:</p> <p>If you type 0, Avaya Workspaces for CRM treats all phone numbers as external numbers.</p> <p>If your local dial plan uses the extensions with the same length as in Local Number Length, type 0.</p>
Country Code	The country code of the current location of your contact center. Avaya Workspaces for CRM uses this value for enhanced outbound number processing.
Local Number Length	The length of the external numbers within your country.
Long Distance Length	The length of the long-distance external numbers within your contact center. Avaya Workspaces for CRM uses this value to analyze outbound numbers and determine the required prefixes.
Emergency Codes	<p>The emergency numbers to call emergency service providers. For example, in the United States, the emergency number is 911. If you type an emergency number in this field, and an agent dials the number, Avaya Workspaces for CRM initiates an emergency call. Emergency calls are routed directly to emergency service providers, and they ignore the existing dialing rules.</p> <p>You can type multiple emergency numbers separated by commas. To disable the emergency calling feature, leave this field blank.</p> <p>For more information about emergency calling, see the Managing users section in <i>Administering Avaya Experience Platform™ Public Cloud</i>.</p>

Related links

[Configuring your contact center](#) on page 58

Activity Options field descriptions

Name	Description
Add Call Duration in Seconds Field API Name	<p>The option to define the API Name of the Activity Duration field that saves the total time of the activity (voice or digital). If the field is empty, Avaya Workspaces for CRM ignores the field and does not save any data.</p> <p>For example, you can type <code>new_callduration</code>.</p>

Table continues...

Name	Description
Add Call Log Object API Field Name	The option to define the API Name of the ID of the interaction field that saves the ID of the interaction. If the field is empty, Avaya Workspaces for CRM ignores the field and does not save any data. For example, you can type <code>new_callid</code> .
Add Call Log Subject Field API Name	The option to define the API Name of the Subject field that saves the subject of an interaction. If the field is empty, Avaya Workspaces for CRM ignores the field and does not save any data. For example, you can type <code>new_subject</code> .
Add Call Type Custom API Field Name	The option to define the API Name of the Call Type field that saves the call type of an interaction. If the field is empty, Avaya Workspaces for CRM ignores the field and does not save any data. For example, you can type <code>new_calltype</code> .
Add Comments Custom API Field Name	The option to define the API Name of the Comment field that saves the user's comments during an interaction. If the field is empty, Avaya Workspaces for CRM ignores the field and does not save any data. For example, you can type <code>new_comments</code> .
Add Related To API Field Name	The option to define the API Name of the Related to field that saves the Related contact associated with an interaction. If the field is empty, Avaya Workspaces for CRM ignores the field and does not save any data. For example, you can type <code>new_relatedto</code> .
Add Status Custom API Field Name	The option to define the API Name of the Status field that saves the status of an interaction. If the field is empty, Avaya Workspaces for CRM ignores the field and does not save any data. For example, you can type <code>new_status</code> .
Agent ID Field API Name	The option to define the Activity Custom field API Name that saves the agent ID. For example, you can type <code>new_agentId</code> .
Consult Field API Name	The option to define the Activity Custom field API Name that saves the consult type. For example, you can type <code>new_consult</code> .
Default Digital Activity Subject	The default value that Avaya Workspaces for CRM displays in the Subject field of digital interactions.
Default Voice Activity Subject	The default value that Avaya Workspaces for CRM displays in the Subject field of voice interactions.

Table continues...

Name	Description
Enable Activity on Incomplete Interactions (Y/N)	<p>The option to enable Avaya Workspaces for CRM to create logs for incomplete interactions.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM creates logs for incomplete interactions. • N: Avaya Workspaces for CRM does not create logs for incomplete interactions.
From Field API Name	<p>The option to define the Activity Custom field API Name that saves Digital Interaction Sender (DNIS).</p> <p>For example, you can type <code>new_from</code>.</p>
Interaction History Size	<p>The number of interactions Avaya Workspaces for CRM saves on the History widget. You can type a number from 0 to 20.</p>
Custom Interaction Log Field 1-3	<p>The option to define custom interaction log fields where the agents save additional details about voice interactions. You can configure these fields to suit your unique business needs. You can add multiple fields separated by a semicolon.</p> <p>For example, you can add a field to save specific customer preferences during sales interactions. The field name must equal the Dynamics 365 column created in the interaction logs table. For example, "new_mycustomdepartment".</p> <p>CIF 1.0 supports only text-type fields, while CIF 2.0 supports both text-type fields and drop-down lists.</p>
Custom Transaction Log Field 1-3	<p>The option to define custom transaction log fields where the agents save additional details about digital interactions. You can configure these fields to suit your unique business needs. You can add multiple fields separated by a semicolon.</p> <p>For example, you can add a field to save specific customer preferences during sales interactions. The field name must equal the Dynamics 365 column created in the interaction logs table. For example, "new_mycustomdepartment".</p> <p>CIF 1.0 supports only text-type fields, while CIF 2.0 supports both text-type fields and drop-down lists.</p>
Log Data (1-2)	<p>The option to enable the Log Data API Name to save values from attributes and engagement parameters. You can add multiple log data fields separated by a semicolon. The required format for an attribute is: <code>CRMCustomActivityField=AttributeKey</code>. The required format for an engagement parameter is: <code>CRMCustomActivityField=EngagementParameterKey</code>. For example, in the Log Data 1 field, type <code>new_language=Language</code> to assign the language that the customer selects during an interaction to an attribute.</p>

Table continues...

Name	Description
<p>Voice/Email/Chat/Messaging Header Labels</p>	<p>The option to display additional information on the header of an incoming interaction card in Alerting, Active and ACW states. You can use engagement parameters, attributes, and intrinsics to display additional information. You can configure voice and digital channels separately.</p> <p>You choose a channel type to display additional information and type a string in the respective field in the following formats:</p> <ul style="list-style-type: none"> • <code>attr:LabelToDisplay=AttributeKey</code> • <code>param:LabelToDisplay=EngagementParameterKey</code> • <code>intrinsic:LabelToDisplay=TOPIC_NAME</code> <p>For example, in the Voice Header Labels field, type <code>param:LabelToDisplay=customerType</code> to display the value for the <code>customerType</code> key received from engagement parameters on the header of an incoming voice interaction card.</p> <p>In the Voice Header Labels field, type <code>attr:LabelToDisplay=Language</code> to display the value for the <code>Language</code> key received from attributes on the header of an incoming voice interaction card.</p> <p>In the Voice Header Labels field, type <code>intrinsic:LabelToDisplay=TOPIC_NAME</code> to display the value for the <code>TOPIC_NAME</code> key received from intrinsics on the header of an incoming voice interaction card.</p>
<p>Queue Field API Name</p>	<p>The option to define the API Name of the Queue field that saves the queue name. If the field is empty, Avaya Workspaces for CRM ignores the field and does not save any data.</p> <p>For example, you can type <code>new_queue</code>.</p>

Table continues...

Name	Description
Show Activity Details? (Y/N/S/A)	<p>The option to enable Avaya Workspaces for CRM to display the Activity Details section to agents.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can view the Activity Details section on interaction cards. When an agent receives an interaction card, Avaya Workspaces for CRM displays the Activity Details section in the collapsed mode. The agent can click the Activity Details section to expand it. • S (Show fields initially): Agents can view the Activity Details section on interaction cards. When an agent receives an interaction card, Avaya Workspaces for CRM displays the Activity Details section in the expanded mode. The agent can click the Activity Details section to collapse it. • A (Always open): Agents can view the Activity Details section on interaction cards. When an agent receives an interaction card, Avaya Workspaces for CRM displays the Activity Details section in the expanded mode. The agent cannot collapse the Activity Details section. • N: Avaya Workspaces for CRM creates logs, but agents cannot view or change them.
Show Comments? (Y/N)	<p>The option to enable Avaya Workspaces for CRM to display the Comments field on interaction cards in the Activity Details section.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays the Comments field. • N: Avaya Workspaces for CRM does not display the Comments field.
Show Name (Y/N)	<p>The option to enable Avaya Workspaces for CRM to display the Name field on interaction cards in the Activity Details section.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays the Name field. • N: Avaya Workspaces for CRM does not display the Name field.
Show Related To	<p>The option to enable Avaya Workspaces for CRM to display the Related To field on interaction cards in the Activity Details section.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays the Related To field on interaction cards in the Activity Details section. • N: Avaya Workspaces for CRM does not display the Related To field on interaction cards in the Activity Details section.
Start Time Field API Name	<p>The option to define the API Name of the Start Time field that saves the start time of interactions.</p> <p>For example, you can type <code>new_Call_Start</code>.</p>

Table continues...

Name	Description
To Field API Name	The option to define the Activity Custom field API Name that saves the Digital Interaction Recipient. For example, you can type <code>new_to</code> .
Activity Log Enabled (Y/N/A/E)	The option to enable Avaya Workspaces for CRM to create call logs. The values are the following: <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM creates logs for all calls. • N: Avaya Workspaces for CRM does not create logs for calls. • A (ACD): Avaya Workspaces for CRM creates logs only for ACD calls. • E (External): Avaya Workspaces for CRM creates logs only for inbound and outbound external calls.

Related links

[Configuring your contact center](#) on page 58

Softphone Options field descriptions

Name	Description
Default Language	The language of the Dynamics 365 UI. Dynamics 365 users can select a UI language other than the default language. If Avaya Workspaces for CRM does not support the UI language the agent selects for the CRM, it uses the language that the Dynamics 365 administrators configure as the default language. If Avaya Workspaces for CRM does not support the default language the administrators configure, it uses English.
Auto Start Work Enabled? (Y/N)	The option to configure the Start Work step when agents log in to Avaya Workspaces for CRM. The values are the following: <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM initiates Start Work automatically after the agent logs in. • N: Avaya Workspaces for CRM does not initiate Start Work automatically after the agent logs in. <p>If you set Auto Start Work Enabled? to N, you can further configure the Start Work Buttons (SW/R/NR/US) and Start Work State (R/NR) options.</p>

Table continues...




Name	Description
Start Work Buttons (SW/R/NR/US)	<p>The option to configure the Start Work button behavior.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • SW (Start Work): Avaya Workspaces for CRM displays the Start Work button. • R (Ready): Avaya Workspaces for CRM displays the Ready button. • NR (Not Ready): Avaya Workspaces for CRM displays the Not Ready button. • US (User Selection): Avaya Workspaces for CRM displays the Ready and Not Ready buttons.
Start Work State (R/NR)	<p>The option to put the agents into Ready or Not Ready state after Start Work is initiated.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • R (Ready): The agent state switches to Ready after Start Work is initiated. • NR (Not Ready): The agent state switches to Not Ready after Start Work is initiated. <p>You can configure Start Work State (R/NR) if the server supports Start Work with the agent state selection. If the server supports Start Work with the agent state selection, the agent state switches automatically after Start Work is initiated.</p>
Auto Sign Out Enabled? (Y/N)	<p>The option to automatically perform the Finish Work step when agents log out of Avaya Workspaces for CRM.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents do not click Finish Work before logging out. • N: Agents must click Finish Work before logging out.
Reports Enabled? (Y/N)	<p>The option to display the View CRM Reports button when the agent clicks .</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: The View CRM Reports button will appear when the agent clicks . • N: The View CRM Reports button will not appear when the agent clicks .
Click-to-Dial Enabled? (Y/N)	<p>The option to enable the click-to-dial feature.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can use the click-to-dial feature. • N: Agents cannot use the click-to-dial feature. If you disable the click-to-dial feature, Dynamics 365 automatically disables the click-to-consult feature.

Table continues...

Name	Description
Click-to-Consult Enabled? (Y/N/T/C)	<p>The option to enable the click-to-consult feature. With the click-to-consult feature, the agent who handles an active call can click a number and initiate a consultative call or transfer the active call.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can use the click-to-consult feature. • N: Agents cannot use the click-to-consult feature. • T (Transfer): Agents can use the click-to-consult feature. When an agent clicks a number while on an active call, Avaya Workspaces for CRM performs a blind transfer. • C (Consult): Agents can use the click-to-consult feature to initiate a consultative call.
Enable manual Not Ready selection (Y/N)	<p>The option to enable agents to switch the agent state to Not Ready.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can switch the agent state to Not Ready. • N: Agents cannot switch the agent state to Not Ready. Avaya Workspaces for CRM does not display this option in the agent state list. The agent state switches to Not Ready if the server initiates it. For example, if an agent does not answer a routed interaction.
Enable manual After Contact Work selection (Y/N)	<p>The option to enable agents to switch the agent state to After Contact Work.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can switch the agent state to After Contact Work. • N: Agents cannot switch the agent state to After Contact Work. Avaya Workspaces for CRM does not display this option in the agent state list. The agent state switches to After Contact Work if the server initiates it. For example, if an agent ends a routed interaction.
Enable Transfer? (Y/C/N)	<p>The option to enable the call transfer feature.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can initiate blind and consulted transfers to other agents or a queue. • C (Consult): Agents can initiate consulted transfers to other agents or a queue. They cannot initiate blind transfers. • N: Agents cannot initiate transfers. <p>If you set the Enable Transfer and Enable Conference to N, agents cannot initiate a consult call.</p>

Table continues...

Name	Description
Enable Conference? (Y/C/N)	<p>The option to enable the conference feature.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can initiate consulted calls as conferences. • C (Consult): Agents can initiate consulted calls as conferences. • N: Agents cannot initiate conferences. <p>If you set the Enable Transfer and Enable Conference to N, agents cannot initiate a consult call.</p>
Transfer Button Enabled? (Y/N/C)	<p>The option to enable the call transfer feature.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can initiate blind and consulted transfers to other agents or a queue. • C (Consult): Agents can initiate consulted transfers to other agents or a queue. They cannot initiate blind transfers. • N: Agents cannot initiate transfers. <p>If you set the Enable Transfer and Enable Conference to N, agents cannot initiate a consult call.</p>
Toggle Channels Enabled (Y/N/P)	<p>The option to enable agents to view the list of channels using the toggle button (>). If you enable this feature, agents can click the toggle button at the bottom of the Avaya Workspaces for CRM softphone to view the list of channels and their availability state.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays the toggle button, which agents can click to expand the list of channels. If one of the channels is unavailable, the toggle button is yellow, and the channel icon in the list of channels is also displayed in yellow. The agent state for unavailable channels changes to Not Ready. • N: Avaya Workspaces for CRM does not display the toggle button. The list of channels is displayed in the expanded view by default. • P (Present): Avaya Workspaces for CRM displays the toggle button, which agents can click to expand the list of channels. If one of the channels is unavailable, Avaya Workspaces for CRM automatically expands the list of channels, and the channel icon is displayed in yellow. The agent state for unavailable channels changes to Not Ready.

Table continues...

Name	Description
Conference Button Enabled? (Y/N/C)	<p>The option to enable the conference feature.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can initiate consulted calls as conferences. • C (Consult): Agents can initiate consulted calls as conferences. • N: Agents cannot initiate conferences. <p>If you set the Enable Transfer and Enable Conference to N, agents cannot initiate a consult call.</p>
Server Response Timeout (seconds)	<p>The option to set a timeout value for the processes that require a response from the Dynamics 365 server. For example, when you activate an agent.</p> <p>When the process that requires a response from the Dynamics 365 server lasts longer than the entered value, Avaya Workspaces for CRM displays the Reset Session button. When an agent clicks the Reset Session button, the server receives a logout request. You can type 0 to disable this feature.</p>
Auto Accept Interaction? (Y/A/N)	<p>The option to automatically accept incoming interactions.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM automatically accepts all incoming interactions. • A (ACD): Avaya Workspaces for CRM automatically accepts routed interactions (ACD, VDN). • N: Avaya Workspaces for CRM does not automatically accept incoming interactions.
Logging security level (N/M/H/D)	<p>The security level of Avaya Workspaces for CRM logs. The security level determines whether the created logs contain fields corresponding to personally identifiable information, such as the customer name, email, or phone number.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • N (None): The created logs contain fields corresponding to identifiable personal information. • M (Medium): The created logs contain fields corresponding to identifiable personal information. Avaya Workspaces for CRM replaces the values in these fields with the following message: <code>adfconnect-value-exists</code>. • H (High): The created logs do not contain fields corresponding to identifiable personal information. • D (Disabled): Avaya Workspaces for CRM does not create interaction logs.

Table continues...





Name	Description
Log persistence duration (minutes)	The time during which Avaya Workspaces for CRM stores logs in the session storage. Type a value in minutes.
Enable drop incoming interaction (Y/I/N)	<p>The option to enable agents to end incoming interactions.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can end incoming interactions. • I (Internal): Agents can only end internal interactions. Agents cannot end routed interactions. • N: Agents cannot end incoming interactions.
Enable manual outbound interaction (Y/N)	<p>The option to enable agents to initiate manual interactions. Agents can initiate interactions using the dialpad, Redial button, history list, or search box.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can initiate manual interactions. • N: Agents cannot initiate manual interactions. <p> Note:</p> <p>This setting does not affect the Click-to-Dial and Click-to-Consult features.</p>
Customer Journey Button Enabled (Y/N)	<p>The option to enable agents to view Customer Journey.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can click  and view Customer Journey. • N: Avaya Workspaces for CRM does not display .
Enable Notifications? (Y/L/T/N)	<p>The option to enable Avaya Workspaces for CRM to display notifications to agents.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can view the notification list and toast (pop-up) notifications. • L (List): Agents can only view the notification list. • T (Toast): Agents can only view pop-up notifications. • N: Agents cannot view notifications.

Table continues...

Name	Description
Set Agent State to Not Ready on RONA?	<p>The option to automatically change the agent state to Not Ready when Redirection On No Answer (RONA) occurs.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agent state changes to Not Ready when RONA occurs. You can enable Avaya Workspaces for CRM to use a reason code when switching the agent state to Not Ready. To indicate a reason code, type <code>Y = number</code>, where <code>number</code> is a reason code number. For example, you can type <code>Y = 1</code>. • N: Agent state does not change to Not Ready when RONA occurs.
Voicemail Number	<p>The phone number that Avaya Workspaces for CRM uses to access voicemail messages.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • If you leave this field empty, Avaya Workspaces for CRM disables the voicemail feature. • If you type a number, Avaya Workspaces for CRM uses this number to enable the voicemail feature. Agents can call the configured number to listen to the messages left by customers.
Enable Advanced Customer History?	<p>The option to enable agents to view advanced customer history. The advanced customer history layout is similar to the standard Avaya Workspaces chat layout, with each message displayed in a separate box. The default customer history displays messages using line separators.</p> <p> Tip:</p> <p>If the agents encounter errors when viewing advanced customer history, set this option to N.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can view advanced customer history. • N: Agents cannot view advanced customer history.
Debounce Time (seconds)	<p>The option to indicate a time interval in seconds for disabling Avaya Workspaces for CRM softphone buttons after an agent clicks a button. For example, if you type a value of 5, agents cannot click any buttons in the Avaya Workspaces for CRM softphone for five seconds after clicking Alerting to accept a digital interaction. If the agent completes the action successfully, Avaya Workspaces for CRM does not disable the buttons.</p>

Related links

[Configuring your contact center](#) on page 58

Reason Codes Enabled field descriptions

Name	Description
Not Ready Reason Enabled? (Y/N/Z)	<p>The option to enable agents to use Not Ready reason codes.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can click Not Ready and select the required Not Ready reason code. • N: Agents can click Not Ready to switch to the Not Ready state, but they cannot select Not Ready reason codes. • Z (Zero): When agents click Not Ready, Avaya Workspaces for CRM only displays the Not Ready reason code of zero.
Disposition Codes Enabled? (Y/N)	<p>The option to enable agents to use disposition codes.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can click More on the interaction card and select the appropriate disposition code. • N: Agents cannot select disposition codes.

Related links

[Configuring your contact center](#) on page 58

Label Options field descriptions

Name	Description
<p>Connected</p> <p>Ready</p> <p>Not Ready</p> <p>Go Ready</p> <p>Go Not Ready</p> <p>After Contact Work</p> <p>After Contact Work (Extended)</p> <p>Pending Not Ready</p> <p>Pending After Contact Work</p> <p>Disposition Codes</p> <p>Cancel</p> <p>Activate</p> <p>Activate Agent</p> <p>Start Work</p> <p>To Start Work</p> <p>Start Work Pending</p> <p>Finish Work</p> <p>Finish Work Pending</p> <p>Sign Out</p> <p>Force Logout</p> <p>Offline</p> <p>Show Offline Agents</p> <p>Hide Offline Agents</p>	<p>You can change the name of a label used in Avaya Workspaces for CRM if your call center uses a different label. For example, if your call center uses the Available agent state label instead of the Ready agent state label, you can type <code>Available</code> in the Ready field. Avaya Workspaces for CRM displays the Available agent state label instead of the Ready agent state label when an agent selects this agent state.</p>

Related links

[Configuring your contact center](#) on page 58

Location API Settings field descriptions

Name	Description
<p>Google Maps API KEY</p>	<p>A unique alphanumeric string that you can generate from the Google Maps platform. For more information, see https://developers.google.com/maps/documentation/javascript/get-api-key.</p>

Related links

[Configuring your contact center](#) on page 58

Screen Pop Options field descriptions

Avaya Workspaces uses the Inline Frame element for the page that the screenpop application displays. When Avaya Workspaces uses the `<iframe>` syntax to display the website, the cookies from the embedded content are considered third-party cookies.

Name	Description
Pop on ANI? (Y/N)	<p>The option to enable screen pops for ANI with the caller's phone number.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays screen pops for ANI. • N: Avaya Workspaces for CRM does not display screen pops for ANI.
POP on DNIS? (Y/N)	<p>The option to enable screen pops for DNIS with the called number.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays screen pops for DNIS. • N: Avaya Workspaces for CRM does not display screen pops for DNIS.
Screen pop on consult or completed conference/ transfer (C/N)	<p>The option to enable Avaya Workspaces for CRM to display screen pops to conference and transfer recipients. Conference and transfer recipients can view screen pops when they receive consultative calls, or when Avaya Workspaces for CRM completes a conference or transfer.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • C (Completed): Avaya Workspaces for CRM displays screen pops to conference and transfer recipients when a transfer or conference is completed. This is the default option. • N: Avaya Workspaces for CRM does not display screen pops to transfer, conference, and consultative call recipients.
International ANI search? (Y/N)	<p>The option to enable Avaya Workspaces for CRM to perform an ANI search using the E.164 format.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM searches for ANI numbers using the E.164 format. • N: Avaya Workspaces for CRM does not search for ANI numbers using the E.164 format.

Table continues...

Name	Description
Suppress Screen Pop (Y/N)	<p>The option to disable screen pops for interactions.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM does not display screen pops for interactions. • N: Avaya Workspaces for CRM displays screen pops for interactions. <p>You need to set the value to Y for suppressing the screen pop on Dynamics 365 and ensure the search is done in the background without the screen pop.</p>
Wait for media before performing screenpop (Y/N)	<p>The option to display the customer details in the screen pop.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • N: When an agent receives an interaction, the screen pop does not display the customer details. Avaya Workspaces for CRM searches for the information associated with this customer in Dynamics 365 using the customer's email. • Y: When an agent receives an interaction, the screen pop displays the customer details. Avaya Workspaces for CRM searches for the information associated with this customer in Dynamics 365 using the customer data collected by the chat initiation form. The information collected by the chat initiation form can include the customer's name and phone number.
Custom Parameter (1-10)	<p>The option to do one or more of the following actions:</p> <ul style="list-style-type: none"> • Display the customer information in the Interaction Details section • Display a screen pop • Replace the default ANI and DNIS values with the new values • Initiate a search through multiple values registered on the customer's contact page on CRM to display a screen pop to the matching object

Related links

[Configuring your contact center](#) on page 58

[Custom parameter use cases](#) on page 146

Configuring a channel provider in the Channel Integration Framework Power App

About this task

Configure a channel provider using the Channel Integration Framework Power App to fetch the Avaya Workspaces for CRM softphone from Avaya Experience Platform™ Public Cloud and enable your agents to use it within Dynamics 365.

Before you begin

- Ensure that you configured your contact center within a Power App.
- Ensure that you installed the Channel Integration Framework Power App.

Procedure

1. On the Power Apps page, select the **Channel Integration Framework** Power App.
2. At the top of the page, click **New**.
Dynamics 365 displays the New Channel Provider page.
3. Fill in the relevant fields.
4. To define what users within Dynamics 365 can access the Avaya Workspaces for CRM softphone, do one of the following:
 - In the Select Unified Interface Apps for the Channel section, select one or multiple Power Apps. All users within the selected Power Apps have access to the softphone.
 - In the Select the Roles for the Channel section, select one or multiple user roles. All users associated with the selected user roles have access to the softphone.
5. At the top of the page, click **Save & Close**.

Related links

- [Avaya Workspaces for CRM integration with Dynamics 365](#) on page 53
- [New Channel Provider field descriptions](#) on page 77
- [Building a URL for the Channel URL field](#) on page 78
- [Configuring your contact center](#) on page 58
- [Configuring Channel Provider in Dynamics 365](#)

New Channel Provider field descriptions

Name	Description
Name	The name of your Avaya Experience Platform™ Public Cloud channel provider.
Label	The title that Dynamics 365 displays on the Avaya Workspaces for CRM softphone widget.
Channel URL	The URL of the Avaya Workspaces for CRM channel provider. To enter this URL, you must build it. For more information, see Building a URL for the Channel URL field on page 78.
Enable Outbound Communication	The option to enable your agents to initiate outbound calls.

Table continues...

Name	Description
Channel Order	The order of the channel providers. If you have multiple channel providers and assign a user to all of them, Dynamics 365 applies to this user the configuration of the channel provider with the highest order. The channel provider with the lowest value in the Channel Order field has the highest order.
API Version	The version of the Channel Integration Framework APIs. Set this value to 1.

Related links

[Configuring a channel provider in the Channel Integration Framework Power App](#) on page 76

Building a URL for the Channel URL field

About this task


Build a URL to enter it in the **Channel URL** field when configuring a channel provider in the Channel Integration Framework Power App. Dynamics 365 uses this URL to fetch Avaya Workspaces for CRM from Avaya Experience Platform™ Public Cloud.

Before you begin

Obtain the following URLs from Avaya:

- The Avaya Workspaces URL
- The URL of the Avaya Experience Platform™ Public Cloud server

Procedure

1. In **Channel URL**, enter your Avaya Workspaces URL.
For example, `https://example.workspaces.avayacloud.com`
2. Add `/sfdc-workspaces/?tenantId=` to the entered URL.
3. Add the account ID to the entered URL.
4. **(Optional)** To copy your account ID, do the following:
 - a. Log in to Application Center Administration.
 - b. In the navigation tree, click **Account**.
 - c. On the Account page, locate your account and click  next to it.
The account ID is added to your clipboard.
5. Add `&tenantUrl=` to the entered URL.
6. Add the URL of the Avaya Experience Platform™ Public Cloud server without the `https://` protocol to the entered URL.

For example, if the URL of the Avaya Experience Platform™ Public Cloud server is `https://example.avayacloud.com`, you must add `example.avayacloud.com` to the entered URL.

7. Add `/auth/realms/` to the entered URL.
8. Add the account ID to the entered URL.
To add the account ID to your clipboard, repeat step 4.
9. Add `&msdIframeOrigin=` to the entered URL.
10. Add the URL of your Dynamics 365 instance to the entered URL.
11. Add `&ccdefName=` to the entered URL.
12. Add the name of your contact center configuration to the entered URL.

The name of your contact center configuration is the name that you enter in the **Internal Name** field when configuring your contact center.

13. At the top of the page, click **Save & Close**.

Example

The entered URL must consist of the following parts:

```
<Avaya Workspaces URL>/sfdc-workspaces/?tenantId=<Account ID>&tenantUrl=<The URL of the Avaya Experience Platform™ Public Cloud server without the https:// protocol>/auth/realms/<Account ID>&msdIframeOrigin=<The URL of your Dynamics 365 instance>&ccdefName=<The name of your contact center configuration>
```

In the example above, the parts of the URL surrounded by "<" and ">" symbols are unique values that you must enter manually.

Related links

- [New Channel Provider field descriptions](#) on page 77
- [Configuring your contact center](#) on page 58

SSO for Dynamics 365

Single sign-on (SSO) is an authentication scheme that allows users to log in with a single ID to several independent software applications. With SSO, agents can log in to Avaya Workspaces for CRM using the same username and password that they use for Dynamics 365. You must configure several URLs in Dynamics 365 and add users to the Dynamics 365 Active Directory to enable Avaya Workspaces for CRM to support SSO. In addition, you must create a metadata file in Dynamics 365 and upload it to Avaya Experience Platform™ Public Cloud. Ensure that the domain name that you are using is not blocked by Avaya Experience Platform™ Public Cloud and ensure that it converts to lowercase for processing by Avaya Experience Platform™ Public Cloud.

To ensure privacy between the identity provider and Salesforce, SSO uses the Security Assertion Markup Language (SAML) v2 protocol. SAML is an open standard for exchanging authentication and authorization data between parties. You must add the Azure Active Directory SAML Toolkit to your Dynamics 365 Active Directory.

Related links

- [Avaya Workspaces for CRM integration with Dynamics 365](#) on page 53
- [Checklist for enabling SSO in Dynamics 365](#) on page 80
- [Adding the Azure Active Directory SAML Toolkit](#) on page 81
- [Configuring URLs](#) on page 81
- [Converting uppercase domain names to lowercase](#) on page 82
- [Adding users and groups in Dynamics 365](#) on page 83
- [Allowlisting the Dynamics 365 domain name](#) on page 83
- [Creating a metadata file in Dynamics 365](#) on page 84
- [Uploading the metadata file to Avaya Experience Platform Public Cloud](#) on page 84
- [Creating users for Dynamics 365 SSO](#) on page 85

Checklist for enabling SSO in Dynamics 365

Use the following checklist to ensure that you perform all steps required for successfully configuring the Avaya Workspaces for CRM integration with Salesforce:

No.	Task	Description	Notes	✓
1.	Add the Azure Active Directory SAML Toolkit.			
2.	Open the Azure Active Directory SAML Toolkit and configure several URLs.	You must ensure that you use the correct format for the URLs.	Relay State is optional. Avaya recommends configuring Logout URL to ensure that users have a better logout experience.	
3.	If your deployment uses uppercase domain names, you must ensure that the format converts to lowercase for Avaya Experience Platform™ Public Cloud.	This is an optional step. If your domain name already uses lowercase, you do not require this step.		
4.	You must add each SSO user to Dynamics 365.	You must also add each SSO user to Avaya Experience Platform™ Public Cloud. This procedure is listed below.		
5.	Add the Dynamics 365 domain name to the Avaya Experience Platform™ Public Cloud allowlist.	You must ensure that messages coming from Dynamics 365 are not blocked by Avaya Experience Platform™ Public Cloud.	You must add the Dynamics 365 domain as an allowlisted domain in Avaya Experience Platform™ Public Cloud. This is necessary in order to be able to create users.	

Table continues...

No.	Task	Description	Notes	✓
6.	Download a metadata file from Dynamics 365.	This file is called Federation Metadata XML .		
7.	Upload the metadata file to Avaya Experience Platform™ Public Cloud.	You must add the metadata file from Dynamics 365 to the Avaya Experience Platform™ Public Cloud element inventory.		
8.	Creating SSO users in Avaya Experience Platform™ Public Cloud.	You must create users with a login ID that exactly matches their Dynamics 365 login ID.		

Related links

[SSO for Dynamics 365](#) on page 79

Adding the Azure Active Directory SAML Toolkit

Procedure

1. Go to the Dynamics 365 Azure Active Directory Administration Center.
2. Add the **Azure AD SAML Toolkit**.
3. Complete the steps.

For more information, see the Microsoft documentation.

Related links

[SSO for Dynamics 365](#) on page 79

Configuring URLs

Before you begin

Add the **Azure AD SAML Toolkit**.

Procedure

1. From your Dynamics 365 dashboard, go to **Enterprise applications > Browse Azure AD Gallery** and click your SSO server application.
2. From the menu, click **Single sign-on**.
3. In the Basic SAML Configuration pane, click **Edit**.
4. Configure the following URLs:

URL	Example
Identifier (Entity ID)	<code>https://<ccass domain>.com/auth/realms/<tenant ID></code>
Reply URL	<code>https://<ccass domain>.com/auth/realms/<tenant ID>/broker/<CCaaS Element Inventory Name JavaScript Escaped>/endpoint/descriptor</code>
Sign on URL	<code>https://<ccass domain>.com/auth/realms/<tenant ID>/protocol/openid-connect/auth?client_id=workspaces&redirect_uri=https<string response from login redirection></code>
Logout URL	<code>https://<Dynamics 365 url>/services/auth/idp/saml2/logout</code>

Related links

- [SSO for Dynamics 365](#) on page 79
- [Figuring out your Sign on URL](#) on page 82

Figuring out your Sign on URL

Procedure

1. Open Avaya Workspaces for CRM in a new tab.
 2. Wait for the login redirection.
 3. Copy and paste the URL.
- This is your Sign on URL.

Related links

- [Configuring URLs](#) on page 81

Converting uppercase domain names to lowercase

About this task

If your Dynamics 365 domain name is in uppercase, you must ensure that it converts to lowercase for handling by Avaya Experience Platform™ Public Cloud.

Procedure

1. From your Dynamics 365 dashboard, go to **Enterprise applications > Browse Azure AD Gallery** and click your SSO server application.
2. From the menu, click **Single sign-on**.
3. In the **Attributes and Claims** pane, click **Edit**
4. Ensure **Unique User Identifier (Name ID)** is set to `ToLowercase (user.userprincipalname) [nameid-format:persistent]`.

Related links

[SSO for Dynamics 365](#) on page 79

Adding users and groups in Dynamics 365**Procedure**

1. From your Dynamics 365 dashboard, go to **Enterprise applications > Browse Azure AD Gallery** and click your SSO server application.
2. From the menu, click **Users and groups**.
3. Click **Add user/group** to add the users for whom you want to allow SSO access.

For more information, see the Microsoft documentation.

Related links

[SSO for Dynamics 365](#) on page 79

Allowlisting the Dynamics 365 domain name**Before you begin**

Log in to Application Center Administration as an account administrator.

Procedure

1. In the navigation tree, click **Accounts**.
2. On the Account page, click **...** next to your account and then click **Edit**.
3. Fill in the fields.
4. Click **Save**.

Related links

[SSO for Dynamics 365](#) on page 79

[Account page field descriptions](#) on page 83

Account page field descriptions

Field	Description
Name	The name of the account. For example, you can type XYZ.
Login Domain(s)	The login domains associated with the Dynamics 365 account that you want to allowlist. For example, you can type xyz.com and press Enter.
Default Login Domain	The default domain for the account.
Emergency Email Address(es)	The email addresses to send a notification about emergency calling.

Table continues...

Field	Description
Description	The description for the account.
Profiles	The profile to assign to the account. You can assign multiple profiles to an account.

Address

Use this section to add an emergency location for your account. After adding an emergency location, you can assign it to existing users. Application Center Administration automatically assigns the default emergency location to all new users. You can add a maximum of five emergency locations for one account and set one of them as default.

Administrator

Use this section to add new account administrators or assign the existing users as administrators to your account.

Related links

[Allowlisting the Dynamics 365 domain name](#) on page 83

Creating a metadata file in Dynamics 365

Procedure

1. From your Dynamics 365 dashboard, go to **Enterprise applications > Browse Azure AD Gallery** and click your SSO server application.
2. From the menu, click **Single sign-on**.
3. In the SAML Signing Certificate pane, at the **Federation Metadata XML** field, click **Download**.

Dynamics 365 downloads the SSO metadata file.

Related links

[SSO for Dynamics 365](#) on page 79

Uploading the metadata file to Avaya Experience Platform™ Public Cloud

Before you begin

Log in to Application Center Administration as an account administrator.

Procedure

1. In the navigation tree, click **Element Inventory**.
2. On the Elements page, click **New > SAML**.
3. On the SAML Server page, fill in the fields.
4. Click **Select XML file** and locate the metadata file that you created in Dynamics 365.
5. Click **Upload**.

Application Center Administration uploads the file and displays a list of options.

6. Select the following:

- **HTTP-POST Binding for AuthnRequest:** Controls the SAML binding when requesting authentication from an external identity provider (IDP). If you set it to OFF, Keycloak uses Redirect Binding.
- **HTTP-POST Binding Logout:** Specifies the SAML logout endpoint. It is an optional field. If your SAML IDP publishes an IDP entity descriptor, the value of this field is specified there.
- **HTTP-POST Binding Response:** Controls the SAML binding in response to any SAML requests sent by an external IDP. If you set it to OFF, Keycloak uses Redirect Binding.

7. Click **Save**.

Related links

[SSO for Dynamics 365](#) on page 79

[SAML Server field descriptions](#) on page 85

SAML Server field descriptions

Name	Description
Name	The name that you entered in the Reply URL field when you configured the URLs for Dynamics 365. Format: <CCaaS Element Inventory Name>
Display Name	The name that Avaya Workspaces for CRM displays on the Login page.
Select XML file	Click to select the metadata file that you created in Dynamics 365.
Upload	Click to upload the metadata file that you created in Dynamics 365 to Avaya Experience Platform™ Public Cloud.

Related links

[Uploading the metadata file to Avaya Experience Platform Public Cloud](#) on page 84

Creating users for Dynamics 365 SSO

About this task

You can create a test agent and assign queues and attributes to that agent. The agent inherits the attributes of the profile that you assign.

Before you begin

- Log in to Application Center Administration as an account administrator.
- Create a profile associated with your account.

Procedure

1. In the navigation tree, click **User Management > Users**.
2. On the Users page, click **Create User**.

3. On the Users page, fill in the fields.
4. Expand the Membership section and fill in the fields.
5. In the User Features section, fill in the fields.
6. Click **Save**.

Related links

- [SSO for Dynamics 365](#) on page 79
- [New User page field descriptions](#) on page 86

New User page field descriptions

Identity

Fields	Description
Account	Select the account, or account hierarchy to create a user. By default, the page displays the account hierarchy selected on the Users page. You can change the account or account hierarchy from this field.
First Name	Enter the first name of the user. You can customize this field to change the first name of the user.
Last Name	Enter the last name of the user.
Display Name	Enter the display name of the user.
Email Address	Enter the email address of the user.
Login ID	Enter the login ID of the user. This field consists of two parts. The login ID and the domain. The domain name comes from the account. The login ID for Avaya Experience Platform™ Public Cloud must match the login ID for Dynamics 365.
Password	Leave this field empty.
Confirm Password	Leave this field empty.
Profile	Select a profile for the user. You must select a profile to enable the Features section. Depending on the profile configuration, different channel options appear in the Features section.

Related links

- [Creating users for Dynamics 365 SSO](#) on page 85

Checklist for configuring Avaya Workspaces for CRM in Dynamics 365 CIF 2.0

Avaya Workspaces for CRM supports Dynamics 365 Channel Integration Framework (CIF) 2.0, maintaining all the functionalities of Dynamics 365 1.0. You can also synchronize agent states between Dynamics 365 and Avaya Workspaces for CRM with Dynamics 365 CIF 2.0.

Prerequisites

Before you start configuring Avaya Workspaces for CRM in Dynamics 365 CIF 2.0, ensure that you do the following:

- Have the following required licenses:
 - Dynamics 365 Customer Service Enterprise
 - Digital Messaging and Voice Add-in
- Use Dynamics 365 (online) 9.1 and later and a multisession app for multisession capabilities.
- Meet the international availability requirements.
- Use the supported web browsers for the live chat widget.
- Allow access to the required websites, geo-specific links, and Government Community Cloud (GCC) links.
- Provision Omnichannel for Customer Service.

For more information about the licenses and prerequisites, see the Dynamics 365 documentation at:

- <https://learn.microsoft.com/en-us/dynamics365/customer-service/implement/system-requirements-omnichannel>
- <https://learn.microsoft.com/en-us/dynamics365/customer-service/implement/omnichannel-provision-license>

Checklist

Use the following checklist to ensure that you perform all steps required for configuring the Avaya Workspaces for CRM integration with Dynamics 365 CIF 2.0:

No.	Task	Description	Notes	✓
1.	Download and import the solution file to Dynamics 365.	Import the solution file to Dynamics 365 to configure your contact center properties.	<p>Download the solution file from https://plds.avaya.com https://support.avaya.com/.</p> <p>For more information on how to download and import the solution file, see the following topics:</p> <ul style="list-style-type: none"> • Downloading the CRM configuration file on page 55 • Importing a solution on page 56 	
2.	Add the contact center entities to the Power App.	Add the contact center entities to the Power App to use it for configuring your contact center. After you add the contact center entities, Dynamics 365 displays them within the Power App.	Create a Power App for your contact center or use an existing Power App to perform this procedure. For more information about creating Power Apps, see the Microsoft documentation.	
3.	(Optional) Create a Contact Log custom table.	<p>You can create a Contact Log custom table to save the interaction logs.</p> <p>After creating the table, you must map the column names with the contact center configuration fields to save in the Custom Interaction Logs table you created.</p>	<p>You can also use the default Custom Log table to skip this step.</p> <p>To create a Custom Log table, see the Dynamics 365 documentation at https://learn.microsoft.com/en-us/power-apps/maker/data-platform/create-edit-entities-solution-explorer.</p>	
4.	Create an agent experience profile.	Create an agent experience profile, add users to the profile, enable all active channels, and assign a third-party voice channel provider.	<p>Perform these actions on the Customer Service Admin Center Power App.</p> <p>To activate Omnichannel, you must enable the All active channels toggle.</p>	
5.	Configure the CIF provider for the new agent experience profile.	Fill out the necessary fields on the CIF provider configuration page.		

Table continues...

No.	Task	Description	Notes	✓
6.	Configure your contact center.	You must configure your contact center using the Power App. Within the Power App, you can configure and change the properties of the Avaya Workspaces for CRM softphone.	You can refer to the CIF 1.0 field descriptions while configuring your contact center, except for the fields related to Omnichannel. Configure the fields related to Omnichannel to synchronize agent states between Dynamics 365 and Avaya Workspaces for CRM and enable the synchronization.	
7.	(Optional) Configure the agent states for Omnichannel.	Configure the Omnichannel fields and configure the reason codes to synchronize agent states between Dynamics 365 and Avaya Workspaces for CRM.	You can configure the reason codes in the Reason Codes tab and in the Productivity tab of the Customer Service Admin Center Power App. Synchronizing the agent states between the Dynamics 365 and Avaya Workspaces for CRM is optional.	

Related links

[Avaya Workspaces for CRM integration with Dynamics 365](#) on page 53

Creating a new agent experience profile

About this task

You must create an agent experience profile, assign agents to it, enable all active channels, and assign a third-party voice channel provider to start using the CIF 2.0.

Before you begin

Ensure that you are on the Customer Service admin center Power App page.

Procedure

1. In the side pane, in the Agent experience section, click **Workspaces**.
Dynamics 365 displays the Workspaces customization page.
2. Next to the Agent experience profiles section, click **Manage**.
Dynamics 365 displays the Agent experience profiles page with a list of the existing agent experience profiles.
3. At the top of the page, click **New**.

Dynamics 365 displays the Create a new agent experience profile window.

4. In the **Name** field, type a name for the new agent experience profile.
For example, type `CIF 2.0`.
5. In the **Unique Name** field, type a unique name in the <prefix>_<name> format.
For example, type `CIF_2.0`.
6. In the **Description** field, type a profile description.
For example, type `Channel Integration Framework 2.0`.
7. Click **Create**.

Dynamics 365 creates the new agent experience profile.

Next steps

Adding users to the new agent experience profile.

Related links

[Avaya Workspaces for CRM integration with Dynamics 365](#) on page 53

[Adding users to the new agent experience profile](#) on page 90

Adding users to the new agent experience profile

About this task

You must choose and add users to the new agent experience profile. The users you add to the agent experience profile work on the CIF 2.0.

Before you begin

Ensure that you are on the new agent experience profile page you created.

Procedure

1. At the top of the page, click **Add users**.
Dynamics 365 displays the Add users window with a list of available agents.
2. To add users, select one or multiple agents from the list.
3. Click **Add**.

Related links

[Creating a new agent experience profile](#) on page 89

Creating a CIF provider for the new agent experience profile

About this task

Create a CIF provider for the new agent experience profile to enable Avaya integration in CIF 2.0.

Procedure

1. In the side pane, in the Agent experience section, click **Workspaces**.
Dynamics 365 displays the Workspaces page.
2. Next to the Third party voice channel provider section, click **Manage**.
3. To create a new provider, click **New**.
Dynamics 365 displays the channel provider configuration page.

Next steps

Configuring the new CIF provider.

Related links

[Avaya Workspaces for CRM integration with Dynamics 365](#) on page 53

[CIF provider field descriptions](#) on page 91

[Building a URL for the Custom Parameters field](#) on page 92

CIF provider field descriptions

The following table lists the field descriptions for CIF provider configuration:

Name	Description
Name	The name of your CIF provider. For example, type <code>Avaya provider</code> .
Unique Name	The unique identifier of your CIF provider in the <code><prefix>_<name></code> format. The prefix must be alphanumeric, 3-8 characters long, and include an underscore. For example, type <code>Avaya_provider</code> .
Label	The label to be displayed as the title of the CIF widget. For example, type <code>avaya_provider</code> .
Channel URL	The CIF provider URL.
Enable Out Bound	The option to enable outbound communication between Dynamics 365 and Avaya Workspaces for CRM widget. Type <code>Yes</code> .

Table continues...

Name	Description
Channel Order	The priority order of showing the channel to the agents and in the Unified Interface apps. Type 1.
Api Version	The version of the CIF APIs. Type 2.
Custom Parameters	The URL for the hosting location of Avaya Workspaces for CRM in the configUrl=https://<dynamicsUrl>&ccdefName=<ccdefName> format: For more information about building the URL, see Building a URL for the Custom Parameters field on page 92.

Related links

[Creating a CIF provider for the new agent experience profile](#) on page 91

Building a URL for the Custom Parameters field**About this task**


Build a URL to enter it in the **Custom Parameters** field when configuring a channel provider in the CIF 2.0 Power App. Dynamics 365 uses this URL to fetch Avaya Workspaces for CRM from Avaya Experience Platform™ Public Cloud.

Before you begin

Obtain the following URLs from Avaya:

- The Avaya Workspaces URL
- The URL of the Avaya Experience Platform™ Public Cloud server

Procedure

1. In **Custom Parameters**, type `configUrl=` before the URL.
For example, `configUrl=https://example.workspaces.avayacloud.com`.
2. Add `/sfdc-workspaces/?tenantId=` to the entered URL.
3. Add the account ID to the entered URL.
4. **(Optional)** To copy your account ID, do the following:
 - a. Log in to Application Center Administration.
 - b. In the navigation tree, click **Account**.
 - c. On the Account page, locate your account and click  next to it.
The account ID is added to your clipboard.
5. Add `&tenantUrl=` to the entered URL.
6. Add the URL of the Avaya Experience Platform™ Public Cloud server without the `https://` protocol to the entered URL.

For example, if the URL of the Avaya Experience Platform™ Public Cloud server is

`https://example.avayacloud.com`, you must add `example.avayacloud.com` to the entered URL.

7. Add `/auth/realms/` to the entered URL.
8. Add the account ID to the entered URL.
To add the account ID to your clipboard, repeat step 4.
9. Add the URL of your Dynamics 365 instance to the entered URL.
10. Add the name of your contact center configuration to the entered URL.

The name of your contact center configuration is the name that you enter in the **Internal Name** field when configuring your contact center.

11. At the top of the page, click **Save & Close**.

Example

The URL you build must consist of the following parts:

```
configUrl=<Avaya Workspaces URL>/sfdc-workspaces/?tenantId=<Account ID>&tenantUrl=<The URL of the Avaya Experience Platform™ Public Cloud server without the https:// protocol>/auth/realms/<Account ID>&ccdefName=<The name of your contact center configuration>
```

In the example above, the parts of the URL surrounded by "<" and ">" symbols are unique values that you must enter manually.

Related links

[Creating a CIF provider for the new agent experience profile](#) on page 91

Configuring your contact center for CIF 2.0

About this task

Configure your contact center for CIF 2.0 to define how Avaya Workspaces for CRM handles incoming and outgoing interactions and manages the experience of your agents.

Configure the Omnichannel fields to synchronize agent states between Dynamics 365 and Avaya Workspaces for CRM and enable the synchronization.

Use this chapter to configure the CIF 2.0 related features. You can use the CIF 1.0 documentation to configure the rest of the fields.

Procedure

1. On the Power Apps page, select the Power App where your contact center is located.
2. Select **Contact Centers**.
3. At the top of the page, click **New**.

Dynamics 365 displays the New Contact Center page.

4. Fill in the relevant fields.
5. At the top of the page, click **Save & Close**.

Related links

- [Avaya Workspaces for CRM integration with Dynamics 365](#) on page 53
- [Activity Options field descriptions](#) on page 94
- [Softphone Options field descriptions](#) on page 95
- [Reason Codes field descriptions](#) on page 98

Activity Options field descriptions

Name	Description
<p>Active Interaction Logs Table Name</p>	<p>The option to enable active interactions log table. If you leave the field empty, the feature remains disabled. Type the Dynamics 365 table name to enable the feature. For example, <code>new_interactions</code>. The value you type must match the table name.</p> <p>Ensure that your Dynamics 365 administrator creates a table in Dynamics 365 with the required rows. For more information about the contact center logs table, see Creating a table for your contact center logs for ongoing interactions on page 98.</p> <p>You need to set the value for Suppress Screen Pop (Y/N) to Y to suppress the screen pop on Dynamics 365 and ensure the search is done in the background without the screen pop. For more information, see Screen Pop Options field descriptions on page 75.</p>

Related links

- [Configuring your contact center for CIF 2.0](#) on page 93

Softphone Options field descriptions

Name	Description
Omnichannel Enabled? (C/S/N)	<p>The option to enable agent state synchronization between the Avaya Workspaces for CRM and Dynamics 365 Omnichannel queues.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Complementary mode (C): The default agent state in Avaya Workspaces for CRM and Dynamics 365 Omnichannel is Not Ready. When the agent state in Avaya Workspaces for CRM changes to Ready, the agent state in Salesforce Omnichannel changes to Not Ready. • Synchronized mode (S): The agent state changes simultaneously in Dynamics 365 Omnichannel and Avaya Workspaces for CRM. When the agent accepts an interaction in one queue, the agent state in the other queue changes to Not Ready. • N: Dynamics 365 Omnichannel is disabled.
Omnichannel Ready Status Name	<p>The option to indicate the Dynamics 365 Ready presence status. You can type multiple Ready presence statuses separated by a semicolon. For example, <code>Ready;Active;Working;Online</code>. The text you type must equal the presence text of the presence state at the Agent experience > Productivity > Custom presence page.</p> <p>When an agent's state in Dynamics 365 changes to "Ready" and the presence status text matches one of the entries in the Omnichannel Ready Status Name field, the agent's status in Avaya Workspaces also updates to "Ready".</p> <p>When an agent's state in Avaya Workspaces changes to "Ready", their status in Dynamics 365 also changes to "Ready," using the first matching presence status text from the Omnichannel Ready Status Name field.</p> <p>You must type at least one Ready presence status text.</p>

Table continues...

Name	Description
<p>Omnichannel Not Ready Status Name</p>	<p>The option to indicate the Dynamics 365 Not Ready presence status. You can type multiple Not Ready presence statuses separated by a semicolon. For example <code>Break;Away;Coffee;Busy</code>. The text you type must equal the presence text of the presence state at the Agent experience > Productivity > Custom presence page.</p> <p>When an agent's state in Dynamics 365 changes to "Not Ready" and the presence status text matches one of the entries in the Omnichannel Not Ready Status Name field, the agent's status in Avaya Workspaces also updates to "Not Ready".</p> <p>When an agent's state in Avaya Workspaces changes to "Not Ready", their status in Dynamics 365 also changes to "Not Ready," using the first matching presence status text from the Omnichannel Not Ready Status Name field.</p> <p>You can associate the entered Dynamics 365 Not Ready presence status texts with the Avaya Workspaces Not Ready reason codes using the Not Ready Reason Code Map with Omnichannel 1-20 fields.</p>
<p>Omnichannel After Contact Work Status Name</p>	<p>The option to indicate the Dynamics 365 Not Ready presence status and associate it with the Avaya Workspaces After Contact Work state. You can type only one Not Ready presence status. The text you type must equal the presence text of the presence state at the Agent experience > Productivity > Custom presence page.</p> <p>When the agent state in Dynamics 365 changes to Not Ready and the Not Ready presence status text matches the presence status text entered in the Omnichannel After Contact Work Status Name field, the agent state in Avaya Workspaces changes to After Contact Work.</p>


Table continues...

Name	Description
Omnichannel Not Ready Reason Code	<p>The option to indicate and label the Avaya Workspaces Not Ready reason code. In Complimentary mode, when the agent state in Dynamics 365 changes to Ready, the agent state in Avaya Workspaces changes to the Not Ready state associated with the entered reason code.</p> <p>If you do not associate Dynamics 365 Not Ready presence statuses with the Avaya Workspaces Not Ready reason codes using the Not Ready Reason Code Map with Omnichannel 1-20 fields, Avaya Workspaces uses the reason code entered in the Omnichannel Not Ready Reason Code field as the default one. The text you type must equal the presence text of the presence state at the Agent experience > Productivity > Custom presence page.</p> <p>You must enter an Avaya Workspaces Not Ready reason code in the following format: <code><reason code number = reason code label></code>.</p> <ul style="list-style-type: none"> • <code><reason code number></code> is the number of the required Not Ready reason code in Avaya Workspaces. • <code><reason code label></code> is the label that Avaya Workspaces displays for this reason code. <p>For example, you can type <code>21 = Digital Not Ready</code>. If you are using Complementary mode, when the agent state in Dynamics 365 changes to Ready, the agent state in Avaya Workspaces changes to the Not Ready state associated with reason code 21, and the reason code is labeled Digital Not Ready.</p>

Related links

[Configuring your contact center for CIF 2.0](#) on page 93

Reason Codes field descriptions

Name	Description
<p>Not Ready Reason Code Map with Omnichannel 1-20</p>	<p>The option to associate the Dynamics 365 Not Ready presence status with the Avaya Workspaces for CRM Not Ready reason code. Enter a value in the following format: <Avaya Workspaces for CRM Not Ready reason code> = <Dynamics 365 Not Ready presence status>, where <Avaya Workspaces Not Ready reason code> is the number for the required Not Ready reason code in Avaya Workspaces for CRM, and <Dynamics 365 Not Ready presence status text> is the required Dynamics 365 Not Ready presence status. The presence text you type must equal the presence text of the presence state at the Agent experience > Productivity > Custom presence page.</p> <p>For example, you can type 1=Break. In Synchronized mode, when the agent state in Dynamics 365 changes to Not Ready, and the Not Ready presence status text is 1, the agent state in Avaya Workspaces for CRM changes to the Not Ready state associated with reason code 1.</p> <p> Note:</p> <p>Ensure that you provide the Dynamics 365 Not Ready presence statuses in the Omnichannel Not Ready Status Name field before you associate them with the Avaya Workspaces Not Ready reason codes using the Not Ready Reason Code Map with Omnichannel fields.</p>

Related links

[Configuring your contact center for CIF 2.0](#) on page 93

Creating a table for your contact center logs for ongoing interactions

Ensure that your Dynamics 365 administrator creates a table with the following rows to store the interaction logs that Avaya Workspaces for CRM creates for your contact center at the beginning of a call. The row names must equal the below values. None of the rows are mandatory, and only the data related to the configured ones are saved.

Your Dynamics 365 administrator must create the custom flow that reads the data from the table and cleans it after data is no longer needed. Avaya saves the record ID in Dynamics sandbox local storage. The record ID points to the table interaction record created at the answer event. With this record ID, data can be collected for the custom flow.

Inbound interactions

The following inbound data is collected when the call is answered:

Dynamics Table Column API Name	Description
new_ContactId	The Dynamics Contact ID or a list of IDs separated by commas. This covers no-match, single-match, and multiple-match scenarios. The Dynamics 365 administrator must parse and use the data in the custom Dynamics flow.
new_InteractionId	The call ID.
new_AgentId	The agent ID.
new_AgentExtension	The agent's station number.
new_VdnName	The Avaya Experience Platform™ On-Prem VDN Name.
new_VdnNumber	The Avaya Experience Platform™ On-Prem VDN Number.
new_SkillName	The Avaya Experience Platform™ On-Prem Skill Name.
new_SkillNumber	The Avaya Experience Platform™ On-Prem Skill Number.
new_StartDate	The date when the call started.
new_StartTime	The time when the call started.
new_Uui	The UUI value configured in Avaya Experience Platform™ On-Prem as a hex format.
new_CallDirection	The call direction. It can be inbound or outbound.
new_Caller	The caller information.
new_Called	The called information.
new_AcceptTime	The time when the call was accepted.
new_AgentLoginId	Avaya Agent Login ID.
new_DynamicsAgentId	Dynamics 365 Agent ID.

Outbound interactions

The following outbound data is collected when the call initiated:

Dynamics Table Column API Name	Description
new_InteractionId	The call ID.
new_AgentId	The agent ID.
new_AgentExtension	The agent's station number.
new_StartTime	The time when the call started.
new_CallDirection	The call direction. It can be inbound or outbound.
new_Caller	The caller information.
new_Called	The called information.
new_AgentLoginId	Avaya Agent Login ID.
new_DynamicsAgentId	Dynamics 365 Agent ID.

Related links

[Avaya Workspaces for CRM integration with Dynamics 365](#) on page 53

Chapter 4: Avaya Workspaces for CRM integration with ServiceNow overview

ServiceNow is a cloud-based platform that enables you to automate business processes across your organization. With ServiceNow, you can use multiple apps and plugins to manage projects, teams, and customer interactions. The ServiceNow platform records all service management processes performed within your organization.

Avaya Workspaces for CRM integration with ServiceNow enables agents in your contact center to perform the following actions while using the ServiceNow functionality:

- Access the Avaya Workspaces for CRM softphone on the ServiceNow website.
- Handle inbound and outbound customer interactions.
- Make internal calls.

Agents use the Avaya Workspaces for CRM softphone capabilities to communicate with customers and the ServiceNow integration to manage the associated ServiceNow information. For example, an agent can select a phone number within the ServiceNow phone directory and initiate an outgoing voice interaction using the Avaya Workspaces for CRM softphone.

This integration also includes supervisor functionalities. For example, it enables supervisors in your contact center to monitor agents and intervene with customers. Within the Avaya Workspaces for CRM softphone, supervisors can use the supervisor dashboard to view the currently active agents and perform supervisor tasks, such as observing interactions, coaching agents, and barging into interactions.

For more information about how agents and supervisors can use the Avaya Workspaces for CRM softphone within ServiceNow, see *Using Avaya Experience Platform™ Public Cloud Avaya Workspaces for CRM*.

As an administrator, you must perform the tasks required for completing the integration of Avaya Workspaces for CRM with ServiceNow. When completing the integration, you can configure your contact center properties and manage your agents' experience. For example, you can enable your agents to transfer calls and set up conferences.

This guide describes the ServiceNow procedures required for the integration process. For more information about administering ServiceNow, see <https://docs.servicenow.com/>.

Related links

[Checklist for configuring Avaya Workspaces for CRM in ServiceNow](#) on page 102

[Downloading the CRM configuration file](#) on page 104

[Importing the contact center configuration](#) on page 104

[CORS rules](#) on page 105

[Configuring your contact center](#) on page 109

[Adding Avaya Experience Platform Public Cloud to the list of trusted domains](#) on page 136

[Creating a table for your contact center logs](#) on page 137

[Testing Workspaces for ServiceNow](#)

Checklist for configuring Avaya Workspaces for CRM in ServiceNow

Use the following checklist to ensure that you perform all steps required for successfully configuring the Avaya Workspaces for CRM integration with ServiceNow:

No.	Task	Description	Notes	✓
1.	Activate the following plugins in ServiceNow: <ul style="list-style-type: none"> • Notify • Openframe • CTI Softphone 	With these plugins, you can integrate the Avaya Workspaces for CRM softphone with your ServiceNow instance and enable your agents to use it to handle interactions.	For more information about activating plugins, see the ServiceNow documentation.	
2.	Import the contact center configuration from the configuration file to ServiceNow.	You must download the contact center configuration file and copy the code within this file to insert it into the field when configuring your contact center. The code specifies the default contact center configuration.	You must download the configuration file from https://support.avaya.com/ .	
3.	Add CORS rules in ServiceNow.	You must add Cross-Origin Resource Sharing (CORS) rules to enable the communication between ServiceNow and Avaya Experience Platform™ Public Cloud.	For more information about adding CORS rules, see the ServiceNow documentation.	

Table continues...

No.	Task	Description	Notes	✓
4.	Configure your contact center using OpenFrame Configuration.	Use this procedure to configure your contact center. Within OpenFrame Configuration, you can specify and change the properties of the Avaya Workspaces for CRM softphone.	When configuring the contact center, you can manage your agents' experience. For example, you can define whether Avaya Workspaces for CRM displays pop-up notifications to agents.	
5.	Add Avaya Experience Platform™ Public Cloud to the list of trusted domains.	ServiceNow only communicates with the URLs included in the list of trusted domains. If the list of trusted domains contains the URLs that point to Avaya Experience Platform™ Public Cloud, you can embed the Avaya Workspaces for CRM softphone in your ServiceNow instance.	For more information about managing the list of trusted domains, see the ServiceNow documentation.	
6.	Create a table for your contact center logs.	ServiceNow uses the created table to store interaction logs that Avaya Workspaces for CRM creates for your contact center.	If you do not create a table for your interaction logs, Avaya Workspaces for CRM does not create interaction logs.	
7.	Add custom fields to the created table using the Form Designer application.	You can define the fields that the created table displays to users when they view interaction logs.	For more information about adding fields to tables, see the ServiceNow documentation.	

Related links

- [Avaya Workspaces for CRM integration with ServiceNow overview](#) on page 101
- [Activating the Plugins within ServiceNow](#)
- [Reviewing the Contact Center File to ServiceNow](#)
- [Configuring Contact Center in ServiceNow](#)
- [Administering Trusted Domains in ServiceNow](#)
- [Creating Tables in ServiceNow](#)
- [Adding Custom Fields in ServiceNow](#)

Downloading the CRM configuration file

Procedure

1. Go to <https://support.avaya.com> to download the Call Center Definition or Software Package for your CRM.
2. Navigate to **Support for Product > Downloads**.
3. In the **Enter Product Name** field, enter Avaya Experience Platform™ Public Cloud.
A list of available software packages is displayed.

This configuration file is also available on <https://plds.avaya.com/> under the name Experience Platform Workspaces for CRM.

Related links

- [Avaya Workspaces for CRM integration with ServiceNow overview](#) on page 101
- [Importing the contact center configuration](#) on page 104
- [Reviewing the Contact Center File to ServiceNow](#)

Importing the contact center configuration

About this task

Import the contact center configuration to specify the properties of your contact center in ServiceNow. You must download the configuration file from the Avaya Support website. The configuration file in XML format contains the code that you must enter in the field when configuring your contact center.

Before you begin

Download the configuration file from the Avaya Support website.

Procedure

1. Open the configuration file on your computer.
The configuration file displays the code that specifies the default configuration of your contact center.
2. Copy the code within the configuration file.

Next steps

Insert the copied code into the field when configuring your contact center on the OpenFrame Configurations page.

Related links

- [Avaya Workspaces for CRM integration with ServiceNow overview](#) on page 101
- [Configuring your contact center](#) on page 109
- [Downloading the CRM configuration file](#) on page 104

[Reviewing the Contact Center File to ServiceNow](#)

CORS rules

Cross-Origin Resource Sharing (CORS) protocol enables the communication between the platforms hosted in different domains, such as ServiceNow and Avaya Experience Platform™ Public Cloud, through Application Programming Interface (API). CORS rules define the domains that can exchange the Representational State Transfer (REST) API requests with ServiceNow.

Add the CORS rules to enable your agents to use the Avaya Workspaces for CRM softphone in ServiceNow. When you add a CORS rule, enter a URL that points to the Avaya Experience Platform™ Public Cloud domain or the domain of your ServiceNow instance. The choice of the URL that you must enter depends on the REST API to which a CORS rule applies.

If a REST API requires entering a URL that points to the Avaya Experience Platform™ Public Cloud domain, you must enter the following: `https://*.avayacloud.com`

If a REST API requires entering a URL that points to the domain of your ServiceNow instance, you can copy it from the address bar of your browser.

For more information about configuring CORS rules, see the ServiceNow documentation.

Related links

[REST APIs description](#) on page 105

REST APIs description

You must create CORS rules to integrate Avaya Workspaces for CRM with ServiceNow. The following table describes the REST APIs for which you must create CORS rules:

REST API	Description
Openframe	Enables agents to access the Avaya Workspaces for CRM softphone in ServiceNow. When you create a CORS rule for this REST API, enter a URL that points to the domain of your ServiceNow instance.
Table API	Enables ServiceNow to create logs for the interactions that agents handle using the Avaya Workspaces for CRM softphone. When you create a CORS rule for this REST API, enter a URL that points to the Avaya Experience Platform™ Public Cloud domain.
Contact	Enables the Avaya Workspaces for CRM softphone to display the contact-related information to agents in ServiceNow. Contacts are Customer Service Management (CSM) records that you create for business-to-business (B2B) customers. B2B is the process of selling products to other businesses. When you create a CORS rule for this REST API, enter a URL that points to the Avaya Experience Platform™ Public Cloud domain.

Table continues...

REST API	Description
Consumer	Enables the Avaya Workspaces for CRM softphone to display the consumer-related information to agents in ServiceNow. Consumers are CSM records that you create for business-to-consumer (B2C) customers. B2C is a process of selling products to individual customers. When you create a CORS rule for this REST API, enter a URL that points to the domain of your ServiceNow instance.
AI Search Assist	Enables the Avaya Workspaces for CRM softphone to display screenpops to agents in ServiceNow. You can configure screenpops in Application Center Administration. When you create a CORS rule for this REST API, enter a URL that points to the Avaya Experience Platform™ Public Cloud domain.

Adding a CORS rule for openframe

About this task

Add a CORS rule that applies to openframe. Openframe is a REST API that enables your agents to access the Avaya Workspaces for CRM softphone in ServiceNow.

Procedure

1. On the ServiceNow home page, in **Filter navigator**, type `CORS Rules` and select **CORS Rules**.
2. At the top of the page, click **New**.
3. In **Name**, type the CORS rule name.
4. In **REST API**, select **openframe [now/openframe]**.
5. In **Domain**, enter a URL that points to the domain of your ServiceNow instance.
You can copy this URL from the address bar of your browser.
6. On the HTTP Methods tab, select the following:
 - **GET**
 - **POST**
7. **(Optional)** Fill in the remaining fields.
For more information about configuring CORS rules, see the ServiceNow documentation.
8. At the bottom of the page, click **Submit**.

Adding a CORS rule for Table API

About this task

Add a CORS rule that applies to Table API. Table API is a REST API that enables ServiceNow to create logs for the interactions that your agents handle using the Avaya Workspaces for CRM softphone.

Procedure

1. On the ServiceNow home page, in **Filter navigator**, type `CORS Rules` and select **CORS Rules**.
2. At the top of the page, click **New**.
3. In **Name**, type the CORS rule name.
4. In **REST API**, select **Table API [now/table]**.
5. In **Domain**, enter `https://*.avayacloud.com`.
6. On the HTTP Methods tab, select the following:
 - **GET**
 - **Patch**
 - **POST**
 - **Delete**
 - **PUT**
7. **(Optional)** Fill in the remaining fields.

For more information about configuring CORS rules, see the ServiceNow documentation.
8. At the bottom of the page, click **Submit**.

Adding a CORS rule for Contact

About this task

Add a CORS rule that applies to Contact. Contact is a REST API that enables the Avaya Workspaces for CRM softphone to display the contact-related information to agents. Contacts are CSM records that you create for B2B customers.

Procedure

1. On the ServiceNow home page, in **Filter navigator**, type `CORS Rules` and select **CORS Rules**.
2. At the top of the page, click **New**.
3. In **Name**, type the CORS rule name.
4. In **REST API**, select **Contact [now/contact]**.
5. In **Domain**, enter `https://*.avayacloud.com`.
6. On the HTTP Methods tab, select the following:
 - **GET**
 - **POST**
7. **(Optional)** Fill in the remaining fields.

For more information about configuring CORS rules, see the ServiceNow documentation.

8. At the bottom of the page, click **Submit**.

Adding a CORS rule for Consumer

About this task

Add a CORS rule that applies to Consumer. Consumer is a REST API that enables the Avaya Workspaces for CRM softphone to display the consumer-related information to agents. Consumers are CSM records that you create for B2C customers.

Procedure

1. On the ServiceNow home page, in **Filter navigator**, type `CORS Rules` and select **CORS Rules**.
2. At the top of the page, click **New**.
3. In **Name**, type the CORS rule name.
4. In **REST API**, select **Consumer [now/consumer]**.
5. In **Domain**, enter a URL that points to the domain of your ServiceNow instance.
You can copy this URL from the address bar of your browser.
6. On the HTTP Methods tab, select the following:
 - **GET**
 - **POST**
7. **(Optional)** Fill in the remaining fields.
For more information about configuring CORS rules, see the ServiceNow documentation.
8. At the bottom of the page, click **Submit**.

Adding a CORS rule for AI Search Assist

About this task

Add a CORS rule that applies to AI Search Assist. AI Search Assist is a REST API that enables the Avaya Workspaces for CRM softphone to display screenpops to your agents. You can configure screenpops in Application Center Administration.

Procedure

1. On the ServiceNow home page, in **Filter navigator**, type `CORS Rules` and select **CORS Rules**.
2. At the top of the page, click **New**.
3. In **Name**, type the CORS rule name.
4. In **REST API**, select **AI Search Assist (Internal API) [now/asia]**.
5. In **Domain**, enter `https://*.avayacloud.com`.

6. On the HTTP Methods tab, select the following:

- **GET**
- **POST**
- **PUT**

7. **(Optional)** Fill in the remaining fields.

For more information about configuring CORS rules, see the ServiceNow documentation.

8. At the bottom of the page, click **Submit**.

Configuring your contact center

About this task

Use OpenFrame Configuration to specify your contact center properties. You can determine the groups of users that have access to the Avaya Workspaces for CRM softphone. When performing this procedure, you must indicate the URL that ServiceNow uses to fetch the Avaya Workspaces for CRM softphone from Avaya Experience Platform™ Public Cloud.

Before you begin

Download the contact center configuration file from the Avaya Support website and copy the code that this file contains.

Procedure

1. On the ServiceNow home page, go to **Open Frame > Configurations**.
2. At the top of the page, click **New**.
3. At the top part of the page, fill in the fields.
4. To provide users with access to the Avaya Workspaces for CRM softphone, in **User Group**, select a group of users and double-click it.

You can repeat this step to provide more users with access to the Avaya Workspaces for CRM softphone.

5. In , insert the code that you copied from the contact center configuration file.
6. In , type the required values next to the parts of the code that specify your contact center properties.
7. At the bottom of the page, click **Submit**.

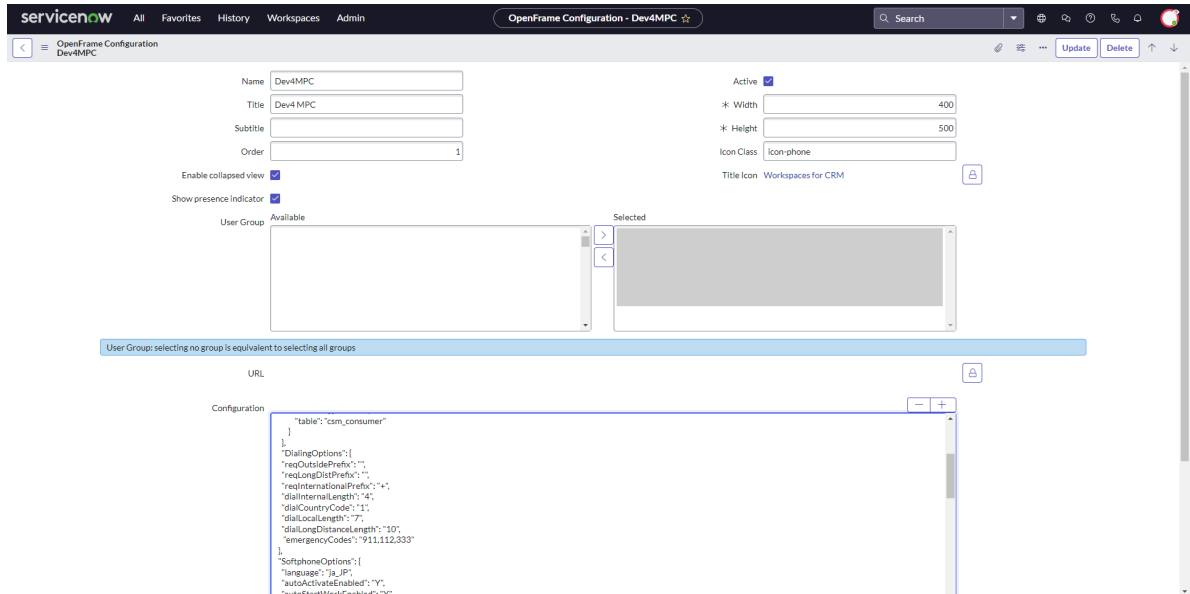


Figure 3: Example of the ServiceNow contact center configuration page

Example

To specify your contact center properties, update the required parts of the code that ServiceNow displays in the field.

For example, the following part of the code enables Avaya Workspaces for CRM to create call logs:

```
"callLogEnabled": "Y",
```

To disable Avaya Workspaces for CRM from creating logs, you must update this part of the code as follows:

```
"callLogEnabled": "N",
```


Related links

- [Avaya Workspaces for CRM integration with ServiceNow overview](#) on page 101
- [Configuring your contact center field descriptions](#) on page 111
- [Dialing Options field descriptions](#) on page 113
- [Softphone Options field descriptions](#) on page 115
- [Activity Options field descriptions](#) on page 124
- [Screen Pop Options field descriptions](#) on page 131
- [Reason Codes Enabled field descriptions](#) on page 133
- [Server Configuration field descriptions](#) on page 134
- [Label Options field descriptions](#) on page 135
- [Importing the contact center configuration](#) on page 104
- [Configuring Contact Center in ServiceNow](#)

Configuring your contact center field descriptions

Name	Description
Name	The name of your OpenFrame Configuration. ServiceNow displays this name on the OpenFrame Configurations page.
Active	The check box that sets your Avaya Workspaces for CRM integration with ServiceNow as active.
Title	The title that ServiceNow displays on the Avaya Workspaces for CRM softphone widget header.
Width	The width of the Avaya Workspaces for CRM softphone widget. You can type a value corresponding to the required width in pixels.
Subtitle	The subtitle that ServiceNow displays on the Avaya Workspaces for CRM softphone widget header.
Height	The height of the Avaya Workspaces for CRM softphone widget. You can type a value corresponding to the required height in pixels.
Order	The order of OpenFrame Configurations. If you have multiple OpenFrame Configurations and assign a user to all of them, this user can only access the OpenFrame Configuration with the highest order. The OpenFrame Configuration with the lowest value in the Order field has the highest order.
Icon Class	The class of icons used within the Avaya Workspaces for CRM softphone widget. Ensure that the value in this field is icon-phone .
Enable collapsed view	Enabling this check box is not required for integrating Avaya Workspaces for CRM with ServiceNow. For more information about this check box, see the ServiceNow documentation.
Title Icon	Filling in this field is not required for integrating Avaya Workspaces for CRM with ServiceNow. For more information about the values that you can type in this field, see the ServiceNow documentation.
Show presence indicator	Enabling this check box is not required for integrating Avaya Workspaces for CRM with ServiceNow. For more information about this check box, see the ServiceNow documentation.

Table continues...

Name	Description
User Group	<p>The option to select groups of users that have access to the Avaya Workspaces for CRM softphone. To access the Avaya Workspaces for CRM softphone, users must belong to one of the selected user groups and have the openframe user role.</p> <p> Note:</p> <p>If you do not select user groups, all users with the openframe user role can access the Avaya Workspaces for CRM softphone.</p> <p>To provide a user group with access to the Avaya Workspaces for CRM softphone, locate and double-click it in the Available field.</p>
URL	<p>The URL of the Avaya Workspaces for CRM channel provider.</p> <p>To enter this URL, you must build it. For more information, see Building a URL for the URL field on page 112.</p>

Related links

[Configuring your contact center](#) on page 109

[Building a URL for the URL field](#) on page 112

Building a URL for the URL field

About this task


Build a URL to enter it in the **URL** field when configuring your contact center in OpenFrame Configuration. ServiceNow uses this URL to fetch Avaya Workspaces for CRM from Avaya Experience Platform™ Public Cloud.

Before you begin

Obtain the following URLs from Avaya:

- The Avaya Workspaces URL
- The URL of the Avaya Experience Platform™ Public Cloud server

Procedure

1. In **URL**, enter your Avaya Workspaces URL.
For example, `https://example.workspaces.avayacloud.com`
2. Add `/sfdc-workspaces/?tenantId=` to the entered URL.
3. Add the account ID to the entered URL.
4. **(Optional)** To copy your account ID, do the following:
 - a. Log in to Application Center Administration.
 - b. In the navigation tree, click **Account**.
 - c. On the Account page, locate your account and click  next to it.
The account ID is added to your clipboard.

5. Add `&tenantUrl=` to the entered URL.
6. Add the URL of the Avaya Experience Platform™ Public Cloud server without the `https://` protocol to the entered URL.

For example, if the URL of the Avaya Experience Platform™ Public Cloud server is

`https://example.avayacloud.com`, you must add `example.avayacloud.com` to the entered URL.

7. Add `/auth/realms/` to the entered URL.
8. Add the account ID to the entered URL.
To add the account ID to your clipboard, repeat step 4.
9. Add `&svnlframeOrigin=` to the entered URL.
10. Add the URL of your ServiceNow instance to the entered URL.
11. Add `&crmType=service-now` to the entered URL.
12. At the bottom of the page, click **Update**.

ServiceNow fills the **URL** field with the entered URL.

Example

The entered URL must consist of the following parts:

```
<Avaya Workspaces URL>/sfdc-workspaces/?tenantId=<Account ID>&tenantUrl=<The URL of the Avaya Experience Platform™ Public Cloud server without the https:// protocol>/auth/realms/<Account ID>&svnlframeOrigin=<The URL of your ServiceNow instance>&crmType=service-now
```

In the example above, the parts of the URL surrounded by "<" and ">" symbols are unique values that you must enter manually.

Related links

[Configuring your contact center field descriptions](#) on page 111

Dialing Options field descriptions

To customize your contact center properties, update the required parts of the code that ServiceNow displays in the **Configuration** field.

For example, the following part of the code enables Avaya Workspaces for CRM to create call logs:

```
"callLogEnabled": "Y",
```

To prevent Avaya Workspaces for CRM from creating logs, you must update this part of the code as follows:

```
"callLogEnabled": "N",
```

The following table describes the parts of the code that ServiceNow displays in the **Configuration** field, under the "DialingOptions":{ section:


Part of the code	Description and values
"reqOutsidePrefix": "",	The prefix that your agents must enter to initiate external calls. For example, you can type "reqOutsidePrefix": "1", to enable your agents to initiate external calls by entering the prefix 1.
"reqLongDistPrefix": "",	The prefix that your agents must enter to initiate long-distance calls. For example, you can type "reqLongDistPrefix": "2", to enable your agents to initiate long-distance calls by entering the prefix 2.
"reqInternationalPrefix": "",	The prefix that your agents must enter to initiate international calls. For example, you can type "reqInternationalPrefix": "999", to enable your agents to initiate international calls by entering the prefix 999.
"dialInternalLength": "",	The length of the internal numbers within your contact center. Avaya Workspaces for CRM uses this value to determine the type of numbers. If the length of a phone number is equal to or less than the entered value, Avaya Workspaces for CRM treats this phone number as an internal number. If the length of a phone number is greater than the entered value, Avaya Workspaces for CRM treats this phone number as an external number. For example, you can type "dialInternalLength": "5", to enable Avaya Workspaces for CRM to treat all phone numbers with the length equal to or less than 5 as internal numbers.  Note: If you type 0, Avaya Workspaces for CRM treats all phone numbers as external numbers. If your local dial plan uses the extensions with the same length as in Local Number Length , type 0.
"dialCountryCode": "",	The country code of the current location of your contact center. Avaya Workspaces for CRM uses this value for enhanced outbound number processing. For example, you can type "dialCountryCode": "2", to enable Avaya Workspaces for CRM to use the country code 2 for outbound number processing.

Table continues...

Part of the code	Description and values
<code>"dialLocalLength": "",</code>	The length of the external numbers within your country. For example, you can type <code>"dialLocalLength": "8"</code> , if the length of external numbers within your country is 8 digits.
<code>"dialLongDistanceLength": "",</code>	The length of the long-distance external numbers within your contact center. Avaya Workspaces for CRM uses this value to analyze outbound numbers and determine the required prefixes. For example, you can type <code>"dialLongDistanceLength": "9"</code> if your contact center uses 9 digits long-distance external numbers.
<code>"emergencyCodes": ""</code>	The emergency numbers that your agents must dial to call the emergency service providers. For example, in the United States, the emergency number is 911. If you type an emergency number in this field, and an agent dials the number, Avaya Workspaces for CRM initiates the emergency call. Emergency calls are routed directly to the emergency service providers, and they ignore the existing dialing rules. You can type multiple emergency numbers separated by commas. To disable the emergency calling feature, leave this field blank. For more information about emergency calling, see the Managing users section in <i>Administering Avaya Experience Platform™ Public Cloud</i> . For example, you can type <code>"emergencyCodes": "911"</code>

Related links

[Configuring your contact center](#) on page 109

Softphone Options field descriptions

To customize your contact center properties, update the required parts of the code that ServiceNow displays in the **Configuration** field.

For example, the following part of the code enables Avaya Workspaces for CRM to create call logs:

```
"callLogEnabled": "Y",
```

To prevent Avaya Workspaces for CRM from creating logs, you must update this part of the code as follows:

```
"callLogEnabled": "N",
```

The following table describes the parts of the code that ServiceNow displays in the **Configuration** field, under the `"SoftphoneOptions": {` section:

Part of the code	Description and values
<pre>"language": "",</pre>	<p>The language of the ServiceNow UI.</p> <p>For example, you can type <code>"language": "en_US"</code>, to display the ServiceNow UI in English.</p> <p>ServiceNow users can select a UI language other than the default language. If Avaya Workspaces for CRM does not support the UI language the agent selects for the CRM, it uses the language that the ServiceNow administrators configure as the default language. If Avaya Workspaces for CRM does not support the default language the administrators configure, it uses English.</p>
<pre>"autoStartWorkEnabled": "",</pre>	<p>The option to configure the Start Work step when agents log in to Avaya Workspaces for CRM.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM initiates Start Work automatically after the agent logs in. • N: Avaya Workspaces for CRM does not initiate Start Work automatically after the agent logs in. <p>If you set <code>"autoStartWorkEnabled": ""</code>, to N, you can further configure the <code>"startWorkButtons": ""</code>, and <code>"startWorkState": ""</code>, options.</p>
<pre>"startWorkButtons": "",</pre>	<p>The option to configure the Start Work button behavior.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • SW (Start Work): Avaya Workspaces for CRM displays the Start Work button. • R (Ready): Avaya Workspaces for CRM displays the Ready button. • NR (Not Ready): Avaya Workspaces for CRM displays the Not Ready button. • US (User Selection): Avaya Workspaces for CRM displays the Ready and Not Ready buttons.

Table continues...

Part of the code	Description and values
"startWorkState": "",	<p>The option to put the agents into Ready or Not Ready state after Start Work is initiated.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • R (Ready): The agent state switches to Ready after Start Work is initiated. • NR (Not Ready): The agent state switches to Not Ready after Start Work is initiated. <p>You can configure "startWorkState": "", if the server supports Start Work with the agent state selection. If the server supports Start Work with the agent state selection, the agent state switches automatically after Start Work is initiated.</p>
"autoSignOutEnabled": "",	<p>The option to enable Avaya Workspaces for CRM to perform the finish work step when agents log out.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents do not click Finish Work before logging out. • N: Agents must click Finish Work before logging out. <p>For example, you can type "autoSignOutEnabled": "Y",</p>
"reportsEnabled": "",	<p>The option to display the View CRM Reports button when the agent clicks ☺.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: The View CRM Reports button will appear when the agent clicks ☺. • N: The View CRM Reports button will not appear when the agent clicks ☺.
"clickToDial": "",	<p>The option to enable the click-to-dial feature.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can use the click-to-dial feature. • N: Agents cannot use the click-to-dial feature. If you disable the click-to-dial feature, ServiceNow automatically disables the click-to-consult feature. <p>For example, you can type "clickToDial": "Y",</p>

Table continues...

Part of the code	Description and values
<code>"clickToConsultEnabled": "",</code>	<p>The option to enable the click-to-consult feature. With the click-to-consult feature, the agent who handles an active call can click a number and initiate a consultative call or transfer the active call.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can use the click-to-consult feature. • N: Agents cannot use the click-to-consult feature. • T (Transfer): Agents can use the click-to-consult feature. When an agent clicks a number while on an active call, Avaya Workspaces for CRM performs a blind transfer. • C (Consult): Agents can use the click-to-consult feature to initiate a consultative call. <p>For example, you can type <code>"clickToConsultEnabled": "Y",</code></p>
<code>"manualNotReadySelectionEnabled": "",</code>	<p>The option to enable agents to switch the agent state to Not Ready.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can switch the agent state to Not Ready. • N: Agents cannot switch the agent state to Not Ready. Avaya Workspaces for CRM does not display this option in the agent state list. The agent state can switch to Not Ready if the server initiates it, for example, if an agent does not answer a routed interaction. <p>For example, you can type <code>"manualNotReadySelectionEnabled": "Y",</code></p>
<code>"manualAfterContactWorkEnabled": "",</code>	<p>The option to enable agents to switch the agent state to After Contact Work.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can switch the agent state to After Contact Work. • N: Agents cannot switch the agent state to After Contact Work. Avaya Workspaces for CRM does not display this option in the agent state list. The agent state can switch to After Contact Work if the server initiates it, for example, if an agent ends a routed interaction. <p>For example, you can type <code>"manualAfterContactWorkEnabled": "Y",</code></p>

Table continues...

Part of the code	Description and values
<pre>"transferButtonEnabled": "",</pre>	<p>The option to enable the call transfer feature.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can initiate blind and consulted transfers to other agents or to a queue. • C (Consult): Agents can initiate consulted transfers to other agents or to a queue. They cannot initiate blind transfers. • N: Agents cannot initiate transfers. <p>For example, you can type "transferButtonEnabled": "Y",</p> <p>If you set both the "transferButtonEnabled": "", and "conferenceButtonEnabled": "", to N, agents cannot initiate a consult call.</p>
<pre>"toggleChannelsEnabled": "",</pre>	<p>The option to enable agents to view the list of channels using the toggle button (>). If you enable this feature, agents can click the toggle button at the bottom of the Avaya Workspaces for CRM softphone to view the list of channels and their availability state.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays the toggle button, and agents can click it to expand the list of channels. If one of the channels becomes unavailable, the toggle button is displayed in yellow, and the channel icon in the list of channels is also displayed in yellow. The agent state for unavailable channels changes to Not Ready. • P (Present): Avaya Workspaces for CRM displays the toggle button, and agents can click it to expand the list of channels. If one of the channels becomes unavailable, Avaya Workspaces for CRM expands the list of channels automatically, and the channel icon is displayed in yellow. The agent state for unavailable channels changes to Not Ready. • N: Avaya Workspaces for CRM does not display the toggle button, and the list of channels is displayed in the expanded view by default. <p>For example, you can type "toggleChannelsEnabled": "Y",</p>

Table continues...

Part of the code	Description and values
<code>"conferenceButtonEnabled": "",</code>	<p>The option to enable the conference feature.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can initiate consulted calls as conferences. • C (Consult): Agents can initiate consulted calls as conferences. • N: Agents cannot initiate conferences. <p>For example, you can type <code>"conferenceButtonEnabled": "Y",</code></p> <p>If you set both the <code>"transferButtonEnabled": "",</code> and <code>"conferenceButtonEnabled": "",</code> to N, agents cannot initiate a consult call.</p>
<code>"serverResponseTimeout": "",</code>	<p>The option to set a timeout value in seconds for the processes that require a response from the ServiceNow server, for example, when you activate an agent. The default value is 120.</p> <p>When the process that requires a response from the ServiceNow server lasts longer than the entered value, Avaya Workspaces for CRM displays the Reset Session button. When an agent clicks the Reset Session button, the server receives a logout request. You can use a value of 0 to disable this feature.</p> <p>For example, you can type <code>"serverResponseTimeout": "100",</code></p>
<code>"autoAcceptInteraction": "",</code>	<p>The option to enable Avaya Workspaces for CRM to accept incoming interactions automatically.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM automatically accepts all incoming interactions. • N: Avaya Workspaces for CRM does not automatically accept all incoming interactions. • A (ACD): Avaya Workspaces for CRM automatically accepts only routed interactions (ACD, VDN). <p>For example, you can type <code>"autoAcceptInteraction": "N",</code></p>

Table continues...

Part of the code	Description and values
<pre>"loginSecurityLevel": "",</pre>	<p>The security level of the logs that Avaya Workspaces for CRM creates. The security level determines whether the created logs can contain the fields that correspond to the personal identifiable information, such as the customer name, email, or phone number.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • H (High): The created logs do not contain the fields that correspond to the personal identifiable information. • M (Medium): The created logs contain the fields that correspond to the personal identifiable information. Avaya Workspaces for CRM replaces values in these fields with the following message: <code>adfconnect-value-exists.</code> • N (None): The created logs contain the fields that correspond to the personal identifiable information. • D (Disabled): Avaya Workspaces for CRM does not create logs for interactions. <p>For example, you can type <code>"loginSecurityLevel": "H",</code></p>
<pre>"logPersistenceDuration": "",</pre>	<p>The time during which Avaya Workspaces for CRM stores logs in the session storage. Type a value in minutes.</p> <p>For example, you can type <code>"logPersistenceDuration": "30",</code></p>
<pre>"dropIncomingInteraction": "",</pre>	<p>The option to enable agents to end incoming interactions.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can end incoming interactions. • I (Internal): Agents can only end internal interactions. Agents cannot end routed interactions. • N: Agents cannot end incoming interactions. <p>For example, you can type <code>"dropIncomingInteraction": "Y",</code></p>

Table continues...



Part of the code	Description and values
<pre>"manualOutboundInteraction": "" ,</pre>	<p>The option to enable Avaya Workspaces for CRM agents to initiate manual interactions. Agents can initiate manual interactions using the dialpad, the Redial button, the history menu, or the search box.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can initiate manual interactions. • N: Agents cannot initiate manual interactions. <p>For example, you can type <pre>"manualOutboundInteraction": "Y",</pre></p> <p>* Note: This setting does not affect the Click-to-Dial and Click-to-Consult features.</p>
<pre>"customerJourneyButtonEnabled" : "" ,</pre>	<p>The option to enable agents to view Customer Journey.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can view Customer Journey by clicking . • N: Avaya Workspaces for CRM does not display . <p>For example, you can type <pre>"customerJourneyButtonEnabled": "N",</pre></p>
<pre>"enableNotifications": "" ,</pre>	<p>The option to enable Avaya Workspaces for CRM to display notifications to agents.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can view the notification list and toast notifications. • L (List): Agents can view only the notification list. • T (Toast): Agents can view only toast notifications. • N: Agents cannot view notifications. <p>For example, you can type <pre>"enableNotifications": "T",</pre></p>

Table continues...


Part of the code	Description and values
<pre>"setAgentStateToNotReadyOnRona": "",</pre>	<p>The option to automatically change the agent state to Not ready when Redirection On No Answer (RONA) occurs.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • N: Agent state does not change to Not Ready when RONA occurs. • Y: Agent state changes to Not Ready when RONA occurs. You can enable Avaya Workspaces for CRM to use a reason code when switching the agent state to Not Ready. To indicate a reason code, type <code>Y = number</code>, where <code>number</code> is a reason code number. For example, you can type <code>"setAgentStateToNotReadyOnRona": "Y=1"</code>,
<pre>"voicemailNumber": "",</pre>	<p>The phone number that Avaya Workspaces for CRM uses to access voicemail messages.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • If you do not type a number, Avaya Workspaces for CRM disables the voicemail feature. • If you type a number, Avaya Workspaces for CRM uses this number to enable the voicemail feature. Agents can call the configured number to listen to the messages left by customers. <p>For example, you can type <code>"voicemailNumber": "",</code></p>
<pre>"advancedCustomerHistoryEnabled": "",</pre>	<p>The option to enable agents to view the advanced customer history. The advanced customer history layout is similar to the standard Avaya Workspaces chat layout with each message displayed in a separate message box. The default customer history displays messages using line separators.</p> <p> Note:</p> <p>If your agents encounter errors when viewing the advanced customer history, type N.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can view the advanced customer history. • N: Agents cannot view the advanced customer history. <p>For example, you can type <code>"advancedCustomerHistoryEnabled": "Y",</code></p>

Table continues...

Part of the code	Description and values
"DebounceTime": ""	The option to indicate a time interval in seconds for disabling the buttons of the Avaya Workspaces for CRM softphone after an agent clicks a button. For example, if you type "DebounceTime": "5", agents cannot click any buttons in the Avaya Workspaces for CRM softphone for five seconds after clicking Alerting to accept a digital interaction. If the agent completes the action successfully, Avaya Workspaces for CRM does not disable the buttons.

Related links

[Configuring your contact center](#) on page 109

Activity Options field descriptions

To customize your contact center properties, update the required parts of the code that ServiceNow displays in the **Configuration** field.

For example, the following part of the code enables Avaya Workspaces for CRM to create call logs:

```
"callLogEnabled": "Y",
```

To prevent Avaya Workspaces for CRM from creating logs, you must update this part of the code as follows:

```
"callLogEnabled": "N",
```

The following table describes the parts of the code that ServiceNow displays in the Configuration field, under the "ActivityOptions": { section:

Part of the code	Description and values
"agentIdFieldApiName": "",	The option to define the Activity Custom field API name that saves the agent ID. For example, you can type "agentIdFieldApiName": "u_agentid"
"callDispositionCustomField": "",	The option to define the API name of the Disposition Reason field that saves the disposition of an interaction. If the field is empty, Avaya Workspaces for CRM ignores the field and does not save any data. For example, you can type "callDispositionCustomField": "u_disposition",

Table continues...

Part of the code	Description and values
"callDurationInSecondsCustomField": "",	The option to define the API name of the Type field that saves the type of an interaction (inbound, outbound, or internal). If the field is empty, Avaya Workspaces for CRM ignores the field and does not save any data. For example, you can type "callDurationInSecondsCustomField": "u_duration",
"callLogCalled": "",	The option to define the Activity Custom field API name that saves the called number (DNIS). For example, you can type "callLogCalled": "u_called",
"callLogCaller": "",	The option to define the Activity Custom field API name that saves the caller ID (ANI). For example, you can type "callLogCaller": "u_caller",
"callLogEnabled": "",	The option to enable Avaya Workspaces for CRM to create call logs. The values are the following: <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM creates logs for all calls. • A (ACD): Avaya Workspaces for CRM creates logs only for ACD calls. • E (External): Avaya Workspaces for CRM creates logs only for inbound and outbound external calls. • N: Avaya Workspaces for CRM does not create logs for calls. For example, you can type "callLogEnabled": "Y",
"callLogFrom": "",	The option to define the Activity Custom field API name that saves Digital Interaction Sender (DNIS). For example, you can type "callLogFrom": "u_from",
"callLogQueue": "",	The option to define the API name of the Queue field that saves the queue name. If the field is empty, Avaya Workspaces for CRM ignores the field and does not save any data. For example, you can type "callLogQueue": "u_calllogoptions_calllogqueue",

Table continues...

Part of the code	Description and values
<code>"callLogShow": "",</code>	<p>The option to enable Avaya Workspaces for CRM to display the Activity Details section to agents.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can view the Activity Details section on interaction cards. When an agent receives an interaction card, Avaya Workspaces for CRM displays the Activity Details section in the collapsed mode. The agents can click the Activity Details section to expand it. • S (Show fields initially): Agents can view the Activity Details section on interaction cards. When an agent receives an interaction card, Avaya Workspaces for CRM displays the Activity Details section in the expanded mode. The agents can click the Activity Details section to collapse it. • A (Always open): Agents can view the Activity Details section on interaction cards. When an agent receives an interaction card, Avaya Workspaces for CRM displays the Activity Details section in the expanded mode. The agent cannot collapse the Activity Details section. • N: Avaya Workspaces for CRM creates logs, but agents cannot view or change them. <p>For example, you can type <code>"callLogShow": "Y",</code></p>
<code>"callLogShowComments": "",</code>	<p>The option to enable Avaya Workspaces for CRM to display the Comments field on interaction cards in the Activity Details section.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays the Comments field on interaction cards in the Activity Details section. • N: Avaya Workspaces for CRM does not display the Comments field on interaction cards in the Activity Details section. <p>For example, you can type <code>"callLogShowComments": "Y",</code></p>

Table continues...

Part of the code	Description and values
"callLogShowName": "",	<p>The option to enable Avaya Workspaces for CRM to display the Name field on interaction cards in the Activity Details section.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays the Name field on interaction cards in the Activity Details section. • N: Avaya Workspaces for CRM does not display the Name field on interaction cards in the Activity Details section. <p>For example, you can type "callLogShowName": "Y",</p>
"callLogShowRelatedTo": "",	<p>The option to enable Avaya Workspaces for CRM to display the Related To field on interaction cards in the Activity Details section.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays the Related To field on interaction cards in the Activity Details section. • N: Avaya Workspaces for CRM does not display the Related To field on interaction cards in the Activity Details section. <p>For example, you can type "callLogShowRelatedTo": "Y",</p>
"callLogTo": "",	<p>The option to define the Activity Custom field API name that saves the Digital Interaction Recipient.</p> <p>For example, you can type "callLogTo": "u_to",</p>
"callTypeCustomField": "",	<p>The option to define the API name of the Call Type field that saves the call type of an interaction. If the field is empty, Avaya Workspaces for CRM ignores the field and does not save any data.</p> <p>For example, you can type "callTypeCustomField": "u_call_type",</p>
"commentsCustomField": "",	<p>The option to define the API name of the Comment field that saves the user's comments during an interaction. If the field is empty, Avaya Workspaces for CRM ignores the field and does not save any data.</p> <p>For example, you can type "commentsCustomField": "u_comments",</p>
"consultFieldApiName": "",	<p>The option to define the Activity Custom field API name that saves the consult type.</p> <p>For example, you can type "consultFieldApiName": "u_consult",</p>

Table continues...

Part of the code	Description and values
<pre>"customVoiceActivityField1": "", "customVoiceActivityField2": "", "customVoiceActivityField3": ""</pre>	<p>The option to define custom interaction log fields where the agents save additional details about voice interactions. You can configure these fields to suit your unique business needs. You can add multiple fields separated by a semicolon.</p> <p>For example, you can type "customVoiceActivityField1": "u_billingDepartment", to add a field to save specific customer preferences during sales interactions. The field name must equal the name of the ServiceNow column created in the interaction logs table.</p> <p>ServiceNow supports text-type fields and drop-down lists.</p>
<pre>"customDigitalActivityField1": "", "customDigitalActivityField2": "", "customDigitalActivityField3": ""</pre>	<p>The option to define custom transaction log fields where the agents save additional details about digital interactions. You can configure these fields to suit your unique business needs. You can add multiple fields separated by a semicolon.</p> <p>For example, you can type "customDigitalActivityField1": "u_billingDepartment", to add a field to save specific customer preferences during sales interactions. The field name must equal the name of the ServiceNow column created in the interaction logs table.</p> <p>ServiceNow supports text-type fields and drop-down lists.</p>
<pre>"defaultVoiceInteractionLogSubject": ""</pre>	<p>The default value that Avaya Workspaces for CRM displays in the Subject field of voice interactions.</p> <p>For example, you can type the following: "defaultVoiceInteractionLogSubject": "Interaction Log Subject example",</p>
<pre>"interactionHistorySize": "5",</pre>	<p>The number of interactions Avaya Workspaces for CRM saves on the History widget. You can type a number from 0 to 20.</p> <p>For example, you can type "interactionHistorySize": "10",</p>
<pre>"logData1": "", "logData2": ""</pre>	<p>The option to enable Log Data API Name to save values from attributes and engagement parameters. You can add multiple fields separated by a semicolon. The required format for an attribute is: CRMCustomActivityField=AttributeKey. The required format for an engagement parameter is: CRMCustomActivityField=EngagementParameterKey. For example, type "logData1": "u_language=Language" to assign the language that the customer selects during an interaction to an attribute.</p>

Table continues...

Part of the code	Description and values
<pre>"voiceHeaderLabels": "", "emailHeaderLabels": "", "chatHeaderLabels": "", "messagingHeaderLabels": "",</pre>	<p>The option to display additional information on the header of an incoming interaction card in Alerting, Active and ACW states. You can use engagement parameters, attributes, and intrinsics to display additional information. You can configure voice and digital channels separately.</p> <p>You choose a channel type to display additional information and type a string in the respective field in the following formats:</p> <ul style="list-style-type: none"> • <code>attr:LabelToDisplay=AttributeKey</code> • <code>param:LabelToDisplay=EngagementParameterKey</code> • <code>intrinsic:LabelToDisplay=TOPIC_NAME</code> <p>For example, type the following for different cases:</p> <ul style="list-style-type: none"> • <code>"voiceHeaderLabels": "param:LabelToDisplay=customerType"</code>, to display the value for the <code>customerType</code> key received from engagement parameters on the header of an incoming voice interaction card. • <code>"voiceHeaderLabels": "attr:LabelToDisplay=Language"</code> to display the value for the <code>Language</code> key received from attributes on the header of an incoming voice interaction card. • <code>"voiceHeaderLabels": "intrinsic:LabelToDisplay=TOPIC_NAME"</code> to display the value for the <code>TOPIC_NAME</code> key received from intrinsics on the header of an incoming voice interaction card.
<pre>"logDefer": ""</pre>	<p>The option to enable Avaya Workspaces for CRM to save logs for deferred emails.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM saves logs for deferred emails. • N: Avaya Workspaces for CRM does not save logs for deferred emails. <p>For example, you can type <code>"logDefer": "Y"</code>,</p>

Table continues...

Part of the code	Description and values
<pre>"logOnIncompleteInteractions": "" ,</pre>	<p>The option to enable Avaya Workspaces for CRM to create logs for incomplete interactions.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM creates logs for incomplete interactions. • N: Avaya Workspaces for CRM does not create logs for incomplete interactions. <p>For example, you can type "logOnIncompleteCalls": "Y",</p>
<pre>"startTimeFieldApiName": "" ,</pre>	<p>The option to define the API name of the Start Time field that saves the start time of interactions.</p> <p>For example, you can type "startTimeFieldApiName": "u_call_start",</p>
<pre>"statusCustomField": "" ,</pre>	<p>The option to define the API name of the Status field that saves the status of an interaction. If the field is empty, Avaya Workspaces for CRM ignores the field and does not save any data.</p> <p>For example, you can type "statusCustomField": "u_status",</p>
<pre>"subjectCustomField": "" ,</pre>	<p>The option to define the API name of the Subject field that saves the subject of an interaction. If the field is empty, Avaya Workspaces for CRM ignores the field and does not save any data.</p> <p>For example, you can type "subjectCustomField": "u_subject",</p>
<pre>"transcriptionFieldApiName": "" ,</pre>	<p>The option to define the API name of the Disposition Reason field that saves the disposition of an interaction. If the field is empty, Avaya Workspaces for CRM ignores the field and does not save any data.</p> <p>For example, you can type "transcriptionFieldApiName": "u_transcript",</p>
<pre>"typeCustomField": "" ,</pre>	<p>The option to define the API name of the Call Type field that saves the call type of an interaction. If the field is empty, Avaya Workspaces for CRM ignores the field and does not save any data.</p> <p>For example, you can type "typeCustomField": "u_type",</p>

Table continues...

Part of the code	Description and values
<pre>defaultDigitalActivitySubject" : "",</pre>	<p>The default value that Avaya Workspaces for CRM displays in the Subject field of digital interactions.</p> <p>For example, you can type <pre>"defaultDigitalActivitySubject": "Interaction Log Subject example",</pre></p>

Related links

[Configuring your contact center](#) on page 109

Screen Pop Options field descriptions

Avaya Workspaces uses the Inline Frame element for the page that the screenpop application displays. When Avaya Workspaces uses the `<iframe>` syntax to display the website, the cookies from the embedded content are considered third-party cookies.

To customize your contact center properties, update the required parts of the code that ServiceNow displays in the **Configuration** field.

For example, the following part of the code enables Avaya Workspaces for CRM to create call logs:

```
"callLogEnabled": "Y",
```

To prevent Avaya Workspaces for CRM from creating logs, you must update this part of the code as follows:

```
"callLogEnabled": "N",
```

The following table describes the parts of the code that ServiceNow displays in the field, under the `"CallScreenPopOptions": { section:`

Name	Description
<pre>"screenPopOnAni": "",</pre>	<p>The option to enable screen pops for Automatic Number Identification (ANI).</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays screen pops for ANI. • N: Avaya Workspaces for CRM does not display screen pops for ANI. <p>For example, you can type <code>"screenPopOnAni": "Y",</code></p>

Table continues...

Name	Description
"screenPopOnDnis": "",	<p>The option to enable screen pops for Dialed Number Identification Service (DNIS).</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM displays screen pops for DNIS. • N: Avaya Workspaces for CRM does not display screen pops for DNIS. <p>For example, you can type "screenPopOnDnis": "N",</p>
"popTransferOrConf": "",	<p>The option to enable Avaya Workspaces for CRM to display screen pops to conference and transfer recipients. Conference and transfer recipients can view screen pops when they receive consultative calls, or when Avaya Workspaces for CRM completes a conference or transfer.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • C (Completed): Avaya Workspaces for CRM displays screen pops to conference and transfer recipients when a transfer or conference is completed. This is the default option. • N: Avaya Workspaces for CRM does not display screen pops to transfer, conference, and consultative call recipients. <p>For example, you can type "popTransferOrConf": "N",</p>
"internationalAnisearch": "",	<p>The option to enable Avaya Workspaces for CRM to perform an ANI search using the E164 format.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM searches for ANI numbers using the E164 format. • N: Avaya Workspaces for CRM does not search for ANI numbers using the E164 format. <p>For example, you can type "internationalAnisearch": "Y",</p>
"suppressScreenPop": "",	<p>The option to disable the screen pops for interactions.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Avaya Workspaces for CRM does not display screen pops for interactions. • N: Avaya Workspaces for CRM displays screen pops for interactions. <p>For example, you can type "suppressScreenPop": "N",</p>

Table continues...

Name	Description
<pre>"waitBeforePerformScreenpop": ""</pre>	<p>The option to display the customer details in the screen pop.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • N: When an agent receives an interaction, the screen pop does not display the customer details. Avaya Workspaces for CRM searches for the information associated with this customer in ServiceNow using the customer email. • Y: When an agent receives an interaction, the screen pop displays the customer details. Avaya Workspaces for CRM searches for the information associated with this customer in ServiceNow using the customer data collected by the chat initiation form. The information collected by the chat initiation form can include the customer's name and phone number. <p>For example, you can type:</p> <pre>"waitBeforePerformScreenpop": "Y",</pre>
<pre>"customParam": "", (1-10)</pre>	<p>The option to do one or more of the following actions:</p> <ul style="list-style-type: none"> • Display the customer information in the Interaction Details section • Display a screen pop • Replace the default ANI and DNIS values with the new values • Initiate a search through multiple values registered on the customer's contact page on the CRM to display a screen pop to the matching object

Related links

[Configuring your contact center](#) on page 109

[Custom parameter use cases](#) on page 146

Reason Codes Enabled field descriptions

To customize your contact center properties, update the required parts of the code that ServiceNow displays in the **Configuration** field.

For example, the following part of the code enables Avaya Workspaces for CRM to create call logs:

```
"callLogEnabled": "Y",
```

To prevent Avaya Workspaces for CRM from creating logs, you must update this part of the code as follows:

```
"callLogEnabled": "N",
```

The following table describes the parts of the code that ServiceNow displays in the field, under the `"ReasonCodesEnabled": {` section:

Name	Description
"logoutReasonEnabled": "",	<p>The option to enable agents to use logout reason codes.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can select logout reason codes. • N: Agents cannot select logout reason codes. <p>For example, you can type "logoutReasonEnabled": "Y",</p>
"auxReasonEnabled": "",	<p>The option to enable agents to use Not Ready reason codes.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • Y: Agents can click Not Ready and select the required Not Ready reason code. • N: Agents cannot select Not Ready reason codes. Agents can click Not Ready to switch to the Not Ready state. • Z (Zero): When agents click Not Ready, Avaya Workspaces for CRM only displays the Not Ready reason code of zero. <p>For example, you can type "auxReasonEnabled": "Y",</p>
"dispositionCodesEnabled": ""	<p>The option to enable agents to use disposition codes.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • N: Agents cannot select disposition codes. • Y: Agents can click More on the interaction card and select the required disposition code. <p>For example, you can type "dispositionCodesEnabled": "Y"</p>

Related links

[Configuring your contact center](#) on page 109

Server Configuration field descriptions

To customize your contact center properties, update the required parts of the code that ServiceNow displays in the **Configuration** field.

For example, the following part of the code enables Avaya Workspaces for CRM to create call logs:

```
"callLogEnabled": "Y",
```

To prevent Avaya Workspaces for CRM from creating logs, you must update this part of the code as follows:

```
"callLogEnabled": "N",
```

The following table describes the parts of the code that ServiceNow displays in the **Configuration** field, under the "ServerConfig": { section:

Name	Description
"useLocalSessionSharing": "",	<p>The option to enable the multiple tabs support.</p> <p>The values are the following:</p> <ul style="list-style-type: none"> • N: The multiple tabs support is disabled. Agents open digital and voice interactions in the same tab.
"serverHostName": "",	<p>The URL of the Avaya Experience Platform™ Public Cloud server. The server hostname indicates the server on which the Avaya Workspaces for CRM softphone is installed. You must obtain this URL from your Avaya Support.</p>
"crmUrl": ""	<p>The URL of your ServiceNow instance.</p>

Related links

[Configuring your contact center](#) on page 109

Label Options field descriptions

To customize your contact center properties, update the required parts of the code that ServiceNow displays in the **Configuration** field.

The following table describes the parts of the code that ServiceNow displays under the "LabelOptions": { section:

Name	Description
<pre> "ready": "", "notReady": "", "goReady": "", "goNotReady": "", "afterContactWork": "", "afterContactWorkExtended": "", "startWork": "", "pendingNotReady": "", "pendingAfterContactWork": "", "dispositionCodes": "", "cancel": "", "activate": "", "activateAgent": "", "toStartWork": "", "startWorkPending": "", "finishWork": "", "finishWorkPending": "", "signOut": "", "forceLogout": "", "offline": "", "showOfflineAgents": "", "hideOfflineAgents": "", </pre>	<p>You can change the name of a label used in Avaya Workspaces for CRM if your call center uses a different label. For example, if your call center uses the Available agent state label instead of the Ready agent state label, you can type Available in the Ready field. Avaya Workspaces for CRM displays the Available agent state label instead of the Ready agent state label when an agent selects this agent state.</p>

Related links

[Configuring your contact center](#) on page 109

Adding Avaya Experience Platform™ Public Cloud to the list of trusted domains

About this task

Add the URLs that point to Avaya Experience Platform™ Public Cloud to the list of trusted domains. If the list of trusted domains contains these URLs, ServiceNow enables you to embed the Avaya Workspaces for CRM softphone in your ServiceNow instance.

*** Note:**

Openframe only processes messages from trusted domains that you specify in the `glide.ui.concourse.onmessage_enforce_same_origin_whitelist` system property.

Before you begin

- Obtain the URL of the Avaya Experience Platform™ Public Cloud server from Avaya Support.
- Build a URL for the **URL** field when configuring your contact center.

Procedure

1. On the ServiceNow home page, in **Filter navigator**, type `sys_properties.list` and press **Enter**.
2. At the top of the page, in **Search**, type `glide.ui.concourse.onmessage_enforce_same_origin_whitelist`.
3. Click the **glide.ui.concourse.onmessage_enforce_same_origin_whitelist** system property.

ServiceNow displays the system property configuration page.

4. In **Value**, enter the following URLs:
 - The URL of your ServiceNow instance
 - The URL of the Avaya Experience Platform™ Public Cloud server
 - The URL that you build for the **URL** field when configuring your contact center

You can separate the entered URLs with commas, spaces, or new lines.

5. **(Optional)** Fill in the remaining fields.

For more information about configuring system properties, see the ServiceNow documentation.

6. At the top of the page, click **Update**.

Related links

[Avaya Workspaces for CRM integration with ServiceNow overview](#) on page 101

[Building a URL for the URL field](#) on page 112

[Server Configuration field descriptions](#) on page 134

[Administering Trusted Domains in ServiceNow](#)

Creating a table for your contact center logs

About this task

Create a table to enable ServiceNow to store the interaction logs that Avaya Workspaces for CRM creates for your contact center.

Before you begin

Configure your contact center on the OpenFrame Configurations page.

Procedure

1. On the ServiceNow home page, go to **System Definition > Tables**.
2. At the top of the page, click **New**.
3. In **Label**, type `InteractionLogs`.

ServiceNow displays the following value in the **Name** field below: `u_interactionlogs`.

4. Fill in the remaining fields.

For more information about configuring tables, see the ServiceNow documentation.

5. At the bottom of the page, click **Submit**.

Next steps

Add custom fields to the created table to display the required interaction information.

Provide access to other users for creating, writing, or reading the interaction logs. For more information about providing access to a group of users, see the ServiceNow documentation.

Related links

[Avaya Workspaces for CRM integration with ServiceNow overview](#) on page 101

[Adding custom fields to the table using the Form Designer application](#) on page 138

[Configuring your contact center](#) on page 109

[Creating Tables in ServiceNow](#)

[Adding Custom Fields in ServiceNow](#)

Adding custom fields to the table using the Form Designer application

About this task

Add custom fields to the table that you created for storing your contact center logs to enable it to display the required information about interactions. For example, you can add the `u_transcript` field to the table to enable ServiceNow to display the call transcript within the created logs.

Before you begin



Create a table for your contact center logs or use an existing table.

Procedure

1. On the ServiceNow home page, go to **System Definition > Tables** and click the table that you created for your contact center logs.
2. At the bottom of the page, in the Related Links section, click **Design Form**.

ServiceNow displays the Form Designer application in a new tab.

3. At the top of the page, on the Fields subtab, locate the field to add to your table.

4. Drag the required field to the main section at the center of the page.
5. Repeat steps 3-4 until you add all required fields.
6. To add custom fields to your table, at the top of the page, click the **Field Types** subtab.
ServiceNow displays the list of field types that you can use to add a custom field.
7. Drag the required field type to the main section at the center of the page.
8. In the main section at the center of the page, click  next to the newly added field type.
ServiceNow displays the Properties window.
9. In **Label**, type the display name for the custom field.
Dynamics 365 displays this value as a field name when a user opens an interaction log.
10. In **Name**, type the custom field name.
The field name exists in the code, and you cannot update it after you create a custom field.
11. Leave the remaining fields blank.
12. At the top of the Properties page, click .
13. Repeat steps 7-12 until you add all required custom fields.
14. At the top of the page, click **Save**.
ServiceNow adds the selected fields to your table. Now, you can view these fields within interaction logs.

Related links

- [Creating a table for your contact center logs](#) on page 137
- [Custom fields description](#) on page 139

Custom fields description

When you add a custom field to the created table, you must configure the following fields:

- **Field type:** The type of information that the field contains.
- **Label:** The name that ServiceNow displays for the added field when a user opens an interaction log.
- **Name:** The name of the field that exists in the code.

The following table describes the field types to select when adding custom fields to the table and the values to enter in the **Name** field. This table also describes the recommended values that you can enter in the **Label** field.

Field type	Label (recommended)	Name
String	Comments	u_comments
String	Called	u_called
String	Caller	u_caller

Table continues...

Field type	Label (recommended)	Name
String	Call Type	u_call_type
String	Call Duration	u_duration
String	Call ID	u_call_id
String	Status	u_status
String	Disposition	u_disposition
String	Wrapup Reason	u_wrapup_reason
String	UUI	u_uui
String	Queue Name	u_calllogoptions_calllogqueue
String	Queue	u_queue
Reference	Contact	u_contact
String	Transcript	u_transcript
String	Type	u_type
String	Subject	u_subject
String	AgentID	u_agentid
String	Call End	u_call_end
String	From	u_from
String	To	u_to
String	UCID	u_ucid

Related links

[Adding custom fields to the table using the Form Designer application](#) on page 138

Chapter 5: Common features

Consult configuration

You can configure the Consult feature in Avaya Orchestration Designer. In the Consult task properties, you can configure the wait treatment for the agent receiving a consult request. The Consult task applies only to voice interactions.

To create a consult route in a workflow, you can connect a Consultation initiated output of an Agent Connected task with a Consult task. When a consultation is in progress, Orchestration shows the Agent Connected and Consult tasks as active tasks.

For more information about the Consult feature, see [Consult interactions](#).

Properties

Properties	Description
Treatment Flow	Type the name of the self-service flow to provide wait treatment to the agent initiating a consultation call. While waiting in a queue, the agent receives the configured wait treatment.
Language	Select the language of the self-service flow.

ACW administration

With the After Contact Work (ACW) feature, agents can perform additional work after an interaction. As an account administrator, you can enable ACW per channel or per queue in Application Center Administration.

You can enable ACW for a channel, such as voice, text messaging, or email. Agents enter the ACW state after ending an interaction in the channel. If you enable ACW for a queue, the agents that work on a particular queue enter the ACW state after ending an interaction in that queue.

In the ACW state, agents can see the transcript and duration of the interaction, the interaction details, and the duration of the ACW state. Agents can also select a disposition code for the interaction and add comments. Avaya Workspaces for CRM saves the disposition code on the Interaction Logs page.

You can enable ACW per channel or queue on Salesforce, Dynamics 365, and ServiceNow when you add new users. For more information, see the Managing users section in *Administering Avaya Experience Platform™ Public Cloud*.

Enabling ACW for a queue

About this task

When you enable the ACW feature for a particular queue, agents working in that queue enter the ACW state after the interaction with the customer ends. While in this state, agents can review the conversation details and receive new interactions after they complete the interaction activity.

Before you begin

Log in to Application Center Administration as an account administrator.

Procedure

1. In the navigation tree, click **Contact Center > Queues**.
2. On the Queues page, click the name of the queue.
3. To enable ACW for the queue, select **After Contact Work**.
4. Click **Save**.

Response templates

In Application Center Administration, you can create response templates for agents to use when handling digital interactions with customers. Templates typically contain frequently-used text or links. Templates enable agents to respond to customers quickly and with well-prepared and formatted text, reducing the interaction time and improving customer experience.

You can create and manage the following types of CRM templates:

- Email templates
- Chat and messaging quick text responses
- URLs
- WhatsApp templates

For more information about configuring response templates, see the *Managing templates* section in *Administering Avaya Experience Platform™ Public Cloud*. For more information about configuring WhatsApp templates, see the *WhatsApp management* section in *Configuring Avaya Social Connections for Avaya Experience Platform™ Public Cloud*.

Avaya Experience Platform™ Public Cloud VDI solution for Citrix

The Avaya Experience Platform™ Public Cloud VDI solution for Citrix has an optimized media solution for the best possible agent and customer audio experience. VDI solutions separate the agent media experience and the agent desktop experience into different places, with the agent

desktop experience residing on the VDI server or VDI service. Separating the agent's media and desktop experience imposes additional interactions over the network, and latent networks may yield a negative agent experience.

Limitations of using Citrix VDI

If you are using Citrix VDI, be aware of the following limitations:

- The local PC must be in the same region as the VDI desktop. Excessive latency between the VDI desktop and the local PC results in slower operation, especially call setup times.
- No support for call flows other than Media Processing Core call flows.

Network latency in a Citrix VDI environment

Avaya recommends the following network latency characteristics when the agent experience is in a VDI environment.

Table 1: Network latency experience

Latency	Avaya
< 50 ms	Great
50 < 100 ms	Acceptable
100 < 150 ms	Degraded
> 150 ms	Not acceptable

To improve the agent and customer experience in a VDI environment, increase the Redirect on No Answer (RONA) timer value in Avaya Experience Platform™ On-Prem using the following recommendations:

Table 2: RONA timer values

Latency	RONA timer
< 40 ms	Do not change.
40 < 80 ms	Do not change.
80 < 150 ms	Increase by 1 second.
150 < 300 ms	Increase by 2 seconds.
> 300 ms	Increase by 3 seconds.

The network latency between the agent desktop and Media Processing Core of Avaya determines the agent audio experience. Agent audio experience is independent of the VDI server. Network latency impacts call signaling and call setup.

Checklist for enabling VDI support for agents

Use this checklist to enable VDI support for an agent or a group of agents.

Ensure that the account administrator and Citrix administrator complete the following configurations to enable VDI support in the agent desktop in Avaya Workspaces:

No.	Task	Reference	Roles	✓
1	Enable the VDI feature on the UX profile.	See Enabling the VDI feature for an agent on page 144.	The account administrator must complete this task.	
2	Register Google Chrome and Microsoft Edge (Chromium) with the Citrix redirection service.	See Registering Google Chrome and Microsoft Edge (Chromium) with the Citrix redirection service on page 145.	The Citrix administrator of the customer must complete this task.	
3	Add Citrix URL as a trusted domain in the Keycloak Tenant configuration.	Add the Citrix URL as a trusted domain in Keycloak tenant configuration to ensure secure and uninterrupted access to Citrix services.	Avaya Keycloak administrator must perform this task.	

Enabling the VDI feature for an agent

About this task

Use this procedure to enable the VDI feature for an agent or a group of agents during profile configuration.

After you enable the VDI feature, the agent can log in to Avaya Workspaces from a local browser or a browser in a VDI environment. However, the login time of the agent increases in a non-VDI environment. Hence, enable VDI only if you have agents who will use the VDI feature.


* Note:

If you configure the agent with a VDI-disabled profile, the agent can log in to Avaya Workspaces from a local browser. However, the agent must not log in to Avaya Workspaces from a browser in a VDI environment, as this configuration is not supported and results in poor audio quality.

Before you begin

Log in to Application Center Administration as an administrator with the Workspaces Admin Widgets Administrators role.

Procedure

1. In the navigation tree, click **Workspaces > UX Profiles**.
2. Go to the UX profile for which you want to enable the VDI feature.
3. Click  to edit the UX profile.
4. In the **General** tab, toggle on the **VDI Enabled** switch.
5. Click **Save**.

Registering Google Chrome and Microsoft Edge (Chromium) with the Citrix redirection service

About this task

For the Citrix UC SDK to function with the Google Chrome and Microsoft Edge (Chromium) browsers, the Citrix administrator must register the binary of the browsers with the Citrix redirection service. The Citrix administrator must register this in the VDI desktop registry.

Before you begin

Add the key and directory if they are unavailable. The key value is a comma-separated list of process names.

Procedure

1. Open the Registry Editor window.
2. Go to **Computer > HKEY_LOCAL_MACHINE > SOFTWARE > WOW6432Node > Citrix > WebSocketService**.
3. Right-click **WebSocketService**, and click **New > Multi-String Value**.
4. Specify the Key Name as `ProcessWhitelist`.
5. Right-click **ProcessWhitelist**, and click **Modify**.
6. In the **Value data** field, enter the following:

```
chrome.exe
msedge.exe
```

7. Click **OK**.
8. After configuring the keys, restart the `CtxHdxWebSocketService` service from Task Manager.

`CtxHdxWebSocketService` is Citrix HDX HTML5 Video Redirection Service.

Adding Citrix URL as trusted domain

About this task

Add the Citrix URL as a trusted domain in the Keycloak tenant configuration to ensure secure and uninterrupted access to Citrix services.

Before you begin

Ensure that you are on the Keycloak tenant configuration page.

Procedure

1. On the Keycloak tenant configuration page, click **Security Defences**.
2. In the **X-Frame Options** field, type `SAMEORIGIN`.
3. In the **Content Security Options** field, type the Citrix URL.

For example, `https://[mycitrixurl]/Citrix/CtxStoreFrontWeb/`

Attributes and engagement parameters

You can configure the following behaviors for Avaya Workspaces for CRM using attributes and engagement parameters:

- Displaying customer information and the interaction details
- Displaying screenpops based on attributes and engagement parameters during interactions
- Saving customer information on the CRM

For example, you can assign an attribute to the queue name to display the queue name from which the interaction comes in the Interaction Details section. You can also display a screenpop based on the queue name during an interaction.

You can configure attributes and engagement parameters to display a screenpop and initiate a search on the CRM records based on the attributes and engagement parameters you configured. Avaya Workspaces for CRM opens the related interaction card when the agent receives an interaction. You can also configure attributes and engagement parameters to initiate a global search on the CRM records for related interactions or use the unique contact ID to display the matching CRM object. You can configure the global search and screenpop with contact ID functions only on Salesforce.

You can configure multiple attributes and engagement parameters and handle multiple interaction details, such as language, department, or account number. You can use attributes and engagement parameters to display these values in the Interaction Details section or display a screenpop.

You can configure the **Log Data 1** and **Log Data 2** fields to save customer information and interaction details on the CRM.

Attributes and engagement parameters provide flexibility for matching multiple customer details and various screenpop options for agents. For example, Avaya Workspaces for CRM compares the calling number to the mobile, home, and business phone number of a customer, depending on the attributes and engagement parameters you configured. Then, it displays a screenpop in the contact page of the calling customer, regardless of the call source. This function is the default in Salesforce, and you must configure it on Dynamics 365 and ServiceNow.

You can display additional information about an incoming interaction on the header of an incoming interaction using engagement parameters, attributes, and intrinsic.

To receive information from a customer, configure the self-service flow you use to route the calls.

For more information about configuring attributes in Application Center Administration, see *Administering Avaya Experience Platform™ Public Cloud*. For more information about engagement parameters, see *Configuring Workflows for Avaya Experience Platform™ Public Cloud*.

Related links

[Custom parameter use cases](#) on page 146

Custom parameter use cases

The Custom Parameter fields enable you to define the attributes and engagement parameters for voice, digital, or Avaya Experience Platform™ Public Cloud interactions. Attributes and engagement parameters enable you to give the agents more context about the interactions they

are handling, automate accessing user information, and save the user information on the CRM. You can initiate different actions based on multiple scenarios, including the following:

Use case	Description and format
Display attributes in the Interaction Details section	<p>You can display the customer inputs in the Interaction Details section.</p> <p><code>attr:.ActivityField=AttributeKey</code> and <code>param:.ActivityField=EngagementParameterKey</code> are the required formats. For example, in the Custom Parameter 1 field, type <code>attr:.Language=Language</code> or <code>param:.Language=Language</code> to assign the language the customer selects during an interaction to an attribute or an engagement parameter.</p> <p>As a result, if the customer selects English as the language during the call, the language is displayed as English in the Interaction Details section.</p>
Display attributes in the Interaction Details section and a screen pop	<p>You can display the customer inputs in the Interaction Details section and a screen pop to the matching CRM object.</p> <p><code>attr:label&Object.Field=AttributeKey</code> and <code>param:label&Object.Field=EngagementParameterKey</code> are the required formats. For example, in the Custom Parameter 1 field, type <code>attr:Language&Contact.Language=Language</code> or <code>param:Language&Contact.Language=Language</code> to assign language as the label, contact as the object, and language as the attribute key or the engagement parameter key.</p> <p>If the customer selects English as the language during the call, the language is displayed as English on the Interaction Details section, and a screen pop is displayed with the matching CRM object.</p> <p>You can configure the CRM actions for the cases without matching data and multiple matching values.</p>
Display a screen pop	<p>You can display a screen pop to the matching CRM object.</p> <p><code>attr:Object.Field=AttributeKey</code> and <code>param:Object.Field=EngagementParameterKey</code> are the required formats. For example, in the Custom Parameter 1 field, type <code>attr:Contact.Language=Language</code> or <code>param:Contact.Language=Language</code> to assign contact as the object, language as the field, and language as the attribute key or the engagement parameter key.</p> <p>If the customer selects English as the language during the call, a screen pop is displayed with the CRM object, where the language input equals English.</p> <p>You can configure the CRM actions for the cases without matching data and multiple matching values.</p>

Table continues...

Use case	Description and format
<p>Save the values on CRM</p>	<p>You can save customer inputs on CRM.</p> <p>The required format is different for all three CRMs:</p> <ul style="list-style-type: none"> <p>Salesforce: attr:CRMCustomActivityField = AttributeKey or param:CRMCustomActivityField = EngagementParameterKey</p> <p>For example, in the Log Data 1 field, type attr:Language__c=Language or param:Language__c=Language to assign the language the customer selects during an interaction to an attribute or engagement parameter and save the value on the CRM.</p> <p>Dynamics 365: attr:CRMCustomActivityField = AttributeKey or param:CRMCustomActivityField = EngagementParameterKey</p> <p>For example, in the Log Data 1 field, type attr:new_language=Language or param:new_language=Language to assign the language the customer selects during an interaction to an attribute or engagement parameter and save the value on the CRM.</p> <p>ServiceNow: attr:CRMCustomActivityField = AttributeKey or param:CRMCustomActivityField = EngagementParameterKey</p> <p>For example, type "logData1": "attr:u_language=Language" or "logData1": "param:u_language=Language" to assign the language the customer selects during an interaction to an attribute or engagement parameter and save the value on the CRM.</p> <p>If the customer selects English as the language during the call, English is saved as the language the customer prefers on the CRM.</p>
<p>Initiate global search (Salesforce)</p>	<p>You can initiate a global search on the CRM directory for customer inputs and display a pop-up screen on the search screen with matching results.</p> <p>attr:* = AttributeKey and param:* = EngagementParameterKey are the required formats. For example, in the Custom Parameter 1 field, type attr:* = Language or param:* = Language to initiate a global search.</p> <p>If the customer selects English as the language during the call, a global search on the CRM records is initiated, and the agent is taken to the search results screen on the CRM based on the softphone layout configuration.</p> <p>This use case is specific to Salesforce.</p>

Table continues...

Use case	Description and format
Display a screen pop based on Object ID (Salesforce)	<p>You can display a screen pop based on the object ID on the CRM.</p> <p><code>attr:ID = AttributeKey</code> and <code>param:ID = EngagementParameterKey</code> are the required formats. For example, in the Custom Parameter 1 field, type <code>attr:ID = ID</code> or <code>param:ID = ID</code> to display a screen pop based on the object ID.</p> <p>If the values the customer provides match an object on the CRM, a screen pop is displayed with this object.</p> <p>This use case is specific to Salesforce.</p>
Caller and called data replacement	<p>You can replace the caller and the called phone numbers received from the customer with new values and display the new values in the Interaction Details section.</p> <p>The required format is <code>attr:ANI=AttributeKey</code> or <code>param:ANI=EngagementParameterKey</code> for the caller and <code>attr:DNIS=AttributeKey</code> or <code>param:DNIS=EngagementParameterKey</code> for the called values. For example, in the Custom Parameter 1 field, type <code>attr:DNIS=AttributeKey</code> or <code>param:DNIS=EngagementParameterKey</code> to replace the caller identity with the department values assigned to the caller on the CRM.</p> <p>If the caller's department is indicated as marketing on the CRM, the caller value is displayed as marketing under the Interaction Details. If multiple ANI and DNIS replacement commands are defined as attributes, the last ANI or DNIS replacement command is performed.</p>
New screen pop directive (Dynamics 365 and ServiceNow)	<p>You can search through multiple values registered on the customer's contact page on the CRM and display a screen pop to the matching object.</p> <p><code>attr:Object.Field=AttributeKey</code> and <code>param:Object.Field=EngagementParameterKey</code> are the required formats. For example, in the Custom Parameter 1 field, type <code>attr:Contact.HomePhone=ANI</code> or <code>param:Contact.HomePhone=ANI</code> to match the caller's phone number with the home phone value registered for the contact on the CRM.</p> <p>If the caller's phone number matches the home phone value on the CRM, a screen pop displays the caller's contact page. You can use this command to search various fields of the caller's contact page, such as Home Phone, Business Phone, Mobile Phone, or Email. Avaya Workspaces for CRM displays a screen pop to the contact page if the ANI matches any of these values.</p> <p>This is the default function for Salesforce, and you must configure it on Dynamics 365 and ServiceNow.</p>

Table continues...

Use case	Description and format
<p>Display additional information on the header of the interaction card</p>	<p>You can display additional information on the header of an incoming interaction card in Alerting, Active, and ACW states. You can use engagement parameters, attributes, and intrinsics to display additional information. You can configure voice and digital channels separately to display different information using the following fields under the Activity Options section of the CRM configuration page:</p> <ul style="list-style-type: none"> • Voice Header Labels • Email Header Labels • Chat Header Labels • Messaging Header Labels <p>You choose a channel type to display additional information and type a string in the respective field in the following formats:</p> <ul style="list-style-type: none"> • <code>attr:LabelToDisplay=AttributeKey</code> • <code>param:LabelToDisplay=EngagementParameterKey</code> • <code>intrinsic:LabelToDisplay=TOPIC_NAME</code> <p>For example, in the Voice Header Labels field, type <code>param:LabelToDisplay=customerType</code> to display the value for the <code>customerType</code> key received from engagement parameters on the header of an incoming voice interaction card.</p> <p>In the Voice Header Labels field, type <code>attr:LabelToDisplay=Language</code> to display the value for the <code>Language</code> key received from attributes on the header of an incoming voice interaction card.</p> <p>In the Voice Header Labels field, type <code>intrinsic:LabelToDisplay=TOPIC_NAME</code> to display the value for the <code>TOPIC_NAME</code> key received from intrinsics on the header of an incoming voice interaction card.</p>

Related links

[Attributes and engagement parameters](#) on page 146

[Configuring screen pop settings for inbound calls](#) on page 43

Chapter 6: Resources

Resources for Avaya Experience Platform™ Public Cloud

Documentation

Related documents and videos

Title	Available at:	Use the document or videos to:	Audience
Overview			
<i>Avaya Experience Platform™ Public Cloud Solution Description</i>	Avaya Experience Platform™ Public Cloud Solution Description	Know about tested product characteristics and capabilities, including product overview and feature descriptions, interoperability, performance specifications, security, and licensing requirements.	<ul style="list-style-type: none"> • Business partners • Implementation engineers • Sales engineers • Solution architects
Implementing			
<i>Configuring Workflows for Avaya Experience Platform™ Public Cloud</i>	Workflows overview for Avaya Experience Platform™ Public Cloud	Create, edit, and manage workflows for Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> • Account administrators • Business analysts • Developers
Administering			
<i>Administering Avaya Experience Platform™ Public Cloud</i>	Administering Avaya Experience Platform™ Public Cloud	Administer Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> • Account administrators • Supervisors
Using			

Table continues...

Title	Available at:	Use the document or videos to:	Audience
<i>Using Avaya Workspaces for Avaya Experience Platform™ Public Cloud</i>	Using Avaya Workspaces for Avaya Experience Platform™ Public Cloud	Use the features and capabilities of Avaya Workspaces for Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> • Agents • Supervisors
<i>Using Analytics for Avaya Experience Platform™ Public Cloud</i>	Using Analytics for Avaya Experience Platform™ Public Cloud	Use the features and capabilities of Avaya Analytics™ for Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> • Account administrators • Report designers • Supervisors
Integrating			
<i>Administering Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud</i>	Administering Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud	Configure and administer the features and capabilities of the Customer Relationship Management (CRM) integrations for Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> • Account administrators • CRM administrators • Developers
<i>Using Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud</i>	Using Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud	Use the features and capabilities of the Customer Relationship Management (CRM) integrations for Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> • Agents • Supervisors
<i>Deploying Preview Dialing for Avaya Experience Platform™ Public Cloud</i>	Deploying Preview Dialing for Avaya Experience Platform™ Public Cloud	Deploy the features and capabilities of Preview Dialing in Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> • Account administrators • Implementation engineers • Sales engineers
<i>Configuring Preview Dialing for Avaya Experience Platform™ Public Cloud</i>	Configuring Preview Dialing for Avaya Experience Platform™ Public Cloud	Configure and administer the features and capabilities of Preview Dialing in Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> • Account administrators • Implementation engineers • Sales engineers
<i>Using Preview Dialing in Avaya Workspaces</i>	Using Preview Dialing in Avaya Workspaces	Use the features and capabilities of Preview Dialing in Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> • Agents • Supervisors

Table continues...

Title	Available at:	Use the document or videos to:	Audience
<i>Configuring corporate contacts for Avaya Workspaces</i>	Configuring corporate contacts for Avaya Workspaces	Configure and administer the features and capabilities of the Corporate Contacts widget in Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> • Account administrators • Implementation engineers • Sales engineers
<i>Using corporate contacts in Avaya Workspaces</i>	Using corporate contacts in Avaya Workspaces	Use the features and capabilities of the Corporate Contacts widget in Avaya Workspaces.	<ul style="list-style-type: none"> • Agents • Supervisors
<i>Configuring Avaya Social Connections for Avaya Experience Platform™ Public Cloud</i>	Configuring Avaya Social Connections for Avaya Experience Platform™ Public Cloud	Configure Avaya Social Connections to add administrators and social media accounts, and manage social media customers.	Account administrators
<i>Using Avaya Social Connections for Avaya Experience Platform™ Public Cloud</i>	Using Avaya Social Connections for Avaya Experience Platform™ Public Cloud	Interact with customers through monitored social media accounts.	<ul style="list-style-type: none"> • Agents • Supervisors
Verint Workforce Engagement documents			
<i>Avaya Experience Platform™ (Public Cloud Workforce Engagement): Desktop Applications Deployment Reference and Installation Guide</i>	Avaya Support link	Configure and administer the features and capabilities of client applications installed on end-user workstations.	<ul style="list-style-type: none"> • Administrators • Implementation engineers • Sales engineers
<i>Avaya Experience Platform™ (Public Cloud Workforce Engagement): Real-Time Agent Assist Setup Guide</i>	Avaya Support link	Configure and administer the features and capabilities of Verint Workforce Engagement Real-Time Agent Assist.	<ul style="list-style-type: none"> • Administrators • Implementation engineers • Sales engineers

Table continues...

Title	Available at:	Use the document or videos to:	Audience
<i>Avaya Experience Platform™ (Public Cloud Workforce Engagement): Technology, Security, and Network Integration Deployment Reference Guide</i>	Avaya Support link	Understand the technology, networking, and security requirements for connecting to Verint Workforce Engagement.	<ul style="list-style-type: none"> • Administrators • Implementation engineers • Sales engineers
<i>Avaya Experience Management™ Getting Started Guide</i>	Avaya Support link	Use the features and capabilities of the Avaya Experience Management™ application for the first time.	<ul style="list-style-type: none"> • Administrators • Implementation engineers • Sales engineers
Videos			
<i>Avaya Experience Platform™ Public Cloud Application Center Administration Videos</i>	Getting started with Administration Center	Administer Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> • Account administrators • Supervisors
<i>Orchestration Videos</i>	Getting started with Orchestration	Manage workflows.	<ul style="list-style-type: none"> • Account administrators • Business analysts • Developers
<i>Avaya Experience Platform™ Public Cloud Automation Videos</i>	Getting started with Automation	Manage the features and capabilities of Automation for Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> • Account administrators • Business analysts • Developers
<i>Administering Avaya Proactive Outreach and Preview Dialing for Avaya Experience Platform™ Public Cloud</i>	Administering Avaya Proactive Outreach and Preview Dialing for Avaya Experience Platform™ Public Cloud	Configure and administer the features and capabilities of Avaya Proactive Outreach and Preview Dialing for Avaya Experience Platform™ Public Cloud.	Account administrators
<i>Administering Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud</i>	Administering Avaya Experience Platform™ Public Cloud Workspaces for CRM	Administer Avaya Experience Platform™ Public Cloud Avaya Workspaces for CRM.	<ul style="list-style-type: none"> • Account administrators • CRM administrators • Supervisors

Table continues...

Title	Available at:	Use the document or videos to:	Audience
<i>Using Avaya Experience Platform™ Public Cloud for supervisors</i>	<ul style="list-style-type: none"> • Getting Started with Avaya Workspaces for Supervisors • Running historical reports and dashboards 	Manage real-time and historical reports.	<ul style="list-style-type: none"> • Account administrators • Supervisors
<i>Using Avaya Experience Platform™ Public Cloud for agents</i>	Launching agent desktop	Manage the features and capabilities of Avaya Workspaces for Avaya Experience Platform™ Public Cloud.	<ul style="list-style-type: none"> • Agents • Supervisors
<i>Getting started with Avaya Experience Platform™ Public Cloud</i>	Overview - Avaya Experience Platform™ Public Cloud	Get an overview of Avaya Experience Platform™ Public Cloud and its components.	All audiences
<i>Getting started with Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud</i>	Getting started with Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud	Get an overview of Avaya Workspaces for CRM for Avaya Experience Platform™ Public Cloud and manage interactions.	All audiences

Avaya Documentation Center navigation

For many programs, the latest customer documentation is available on the Avaya Documentation Center website at <https://documentation.avaya.com>. Some functionality is only available when you log in to the Avaya Documentation Center. The available functionality depends on your role.

Important:

If the documentation you are looking for is not available on the Avaya Documentation Center, you can find it on the [Avaya Support website](#).

While navigating through the Documentation Center, you can click the **Avaya Documentation Center** logo at the top of the screen to return to the home page anytime. On the Avaya Documentation Center, you can do the following:

- Click **Avaya Links** in the top menu bar to access other Avaya websites, including the Avaya Support website.
- Click **Languages** (🌐) in the top menu bar to change the display language and view localized documents.
- In the **Search Documentation** field, search for keywords and click **Filter** to filter by solution category, product, or user role.

You can select multiple items in each filter category. For example, you can select a product and multiple user roles.

- Click **Library** in the top menu bar to access the complete library of documents. Use the filtering options to refine your results.
- After performing a search or accessing the library, you can sort content on the search results page. When you find the item you want to view, click it to open it.
- Use the table of contents in a document for navigation. You can also click < or > next to the document title to navigate to the previous topic or the next topic.
- Click **Share** (↗) to share a topic by email or copy the URL.
- Download a PDF of the current topic in a document, the topic and its subtopics, or the entire document.
- Print the section you are viewing.
- Add content to a collection by clicking **Add to My Topics** (📁). You can add the topic and its subtopics or add the entire publication.
- View the topics in your collections. To access your collections, click your name in the top menu bar and then click **My Topics**.

You can do the following:

- Create, rename, and delete a collection.
 - Set a collection as the default or favorite collection.
 - Save a PDF of the selected content in a collection and download it to your computer.
 - Share content in a collection with others through email.
 - Receive collections that others have shared with you.
- Click **Watch** (👁) to add a topic to your watchlist so you are notified when the content is updated or removed.
 - View and manage your watchlist by clicking **Watchlist** from the top menu with your name.

You can do the following:

- Enable **Email notifications** to receive email alerts.
 - Unwatch the selected content or all topics.
- Send feedback for a topic.

Resource Center

Avaya Experience Platform™ Public Cloud contains a Resource Center which gives access to online help. You can access help from Avaya Workspaces and Application Center Administration screens. From these screens, Resource Center suggests topics appropriate to your current page. You can also access tutorial videos and documentation using this feature.

Related links

[Accessing online help](#) on page 157

[Welcome guides](#) on page 157

Accessing online help


About this task

Avaya Experience Platform™ Public Cloud contains online help for Avaya Workspaces and Application Center Administration.

Before you begin

Log in to Avaya Workspaces or Application Center Administration.

Procedure

1. Click .
2. On **Resource Center**, do one of the following:
 - Click **Documentation**.
 - Click **Tutorial Videos**.


Avaya Experience Platform™ Public Cloud opens a new browser tab to display the document or video.

Related links

[Resource Center](#) on page 156

Welcome guides

Avaya Experience Platform™ Public Cloud contains guided walkthroughs which provide first-time visitors with a tour of the interface. Avaya Workspaces and Application Center Administration support these tours.

- To start the tour, click **Launch Tour**.
- To close the tour, click .

Related links

[Resource Center](#) on page 156

Training

The following courses are available for Avaya Experience Platform™ Public Cloud.

Course code	Course title	Direct link	Delivery type
Administrator			
61380W	Administering Avaya Experience Platform™ Public Cloud	Administering Avaya Experience Platform™ Public Cloud	Web-based training

Table continues...

Course code	Course title	Direct link	Delivery type
61410W	Administrating Avaya Experience Platform™ Public Cloud Workflows	Administrating Avaya Experience Platform™ Public Cloud Workflows	Web-based training
61420W	Administering Avaya Experience Platform™ Public Cloud Self-Service	Administering Avaya Experience Platform™ Public Cloud Self-Service	Web-based training
61000W	Getting Started with Avaya Experience Platform™ Public Cloud	Getting Started with Avaya Experience Platform™ Public Cloud	Web-based training
ASAC-0036	Avaya Experience Platform™ Public Cloud Administrator	Avaya Experience Platform™ Public Cloud Administrator	Web-based training
ASAC-0030	Avaya Cloud Office™ Administration	—	Web-based training
End user			
ALEU-5017	Avaya Experience Platform™ Public Cloud End User Training	—	Web-based training
62420W	Using Avaya Experience Platform™ Public Cloud for Agents	Using Avaya Experience Platform™ Public Cloud for Agents	Web-based training
62520W	Using Avaya Experience Platform™ Public Cloud for Supervisors	Using Avaya Experience Platform™ Public Cloud for Supervisors	Web-based training
ALEU-5025	Avaya Experience Platform™ Public Cloud End-User Training	Avaya Experience Platform™ Public Cloud End-User Training	Web-based training
—	Avaya Experience Platform™ Public Cloud Deep Dive at Avaya Sales Portal .	—	Web-based training This course requires SSO login.

Support

Go to the Avaya Support website at <https://support.avaya.com> for the most up-to-date documentation, product notices, and knowledge articles. You can also search for release notes, downloads, and resolutions to issues. Use the online service request system to create a service request. Chat with live agents to get answers to questions, or request an agent to connect you to a support team if an issue requires additional expertise.

Using the Avaya InSite Knowledge Base

The Avaya InSite Knowledge Base is a web-based search engine that provides:

- Up-to-date troubleshooting procedures and technical tips.
- Information about service packs.
- Access to customer and technical documentation.
- Information about training and certification programs.
- Links to other pertinent information.

If you are an authorized Avaya Partner or a current Avaya customer with a support contract, you can access the Knowledge Base without extra cost. You must have a login account and a valid Sold-To number.

Use the Avaya InSite Knowledge Base for any potential solutions to problems.

1. Go to <https://support.avaya.com>.
2. To log in, click **Sign In** at the top of the screen and then enter your login credentials when prompted.
3. Click **Product Support > Products**.
4. In **Search Product**, start typing the product name and then select the appropriate product from the list displayed.
5. Select the release number, if applicable.
6. Click the **Technical Solutions** tab to view articles for resolving technical issues.

Resources for Avaya Experience Platform™ (On-Prem + Connect)

Documentation

Related documents

Title	Available at:	Use the document to:	Audience
Overview			

Table continues...

Title	Available at:	Use the document to:	Audience
<i>Avaya Experience Platform™ Public Cloud Solution Description</i>	Avaya Experience Platform™ Public Cloud Solution Description	Know about tested product characteristics and capabilities, including product overview and feature descriptions, interoperability, performance specifications, security, and licensing requirements.	<ul style="list-style-type: none"> • Sales engineers • Business partners • Solution architects • Implementation engineers
Deploying			
<i>Deploying Avaya Experience Platform™ (On-Prem + Connect)</i>	Deploying Avaya Experience Platform™ (On-Prem + Connect)	Prepare, install, and configure Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> • Implementation engineers • Account administrators
Administering			
<i>Administering Avaya Experience Platform™ Public Cloud</i>	Administering Avaya Experience Platform™ Public Cloud	Administer Avaya Experience Platform™ Public Cloud and Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> • Account administrators • Supervisors
<i>Administering Avaya Workspaces for CRM with Avaya Experience Platform™ (On-Prem + Connect)</i>	Administering Avaya Workspaces for CRM with Avaya Experience Platform™ (On-Prem + Connect)	Configure and administer the features and capabilities of the Customer Relationship Management (CRM) integrations for Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> • Developers • CRM Administrators • Avaya Experience Platform™ Administrators
<i>Configuring corporate contacts for Avaya Workspaces with Avaya Experience Platform™ (On-Prem + Connect)</i>	Configuring corporate contacts for Avaya Workspaces with Avaya Experience Platform™ (On-Prem + Connect)	Configure and administer the features and capabilities of the Corporate Contacts widget in Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> • Sales engineers • Implementation engineers • Administrators
Using			
<i>Using Avaya Workspaces for Avaya Experience Platform™ (On-Prem + Connect)</i>	Using Avaya Workspaces for Avaya Experience Platform™ (On-Prem + Connect)	Use the features and capabilities of Avaya Workspaces for Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> • Agents • Supervisors

Table continues...

Title	Available at:	Use the document to:	Audience
<i>Using Avaya Workspaces for CRM with Avaya Experience Platform™ (On-Prem + Connect)</i>	Using Avaya Workspaces for CRM with Avaya Experience Platform™ (On-Prem + Connect)	Use the features and capabilities of the Customer Relationship Management (CRM) integrations for Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> • Agents • Supervisors
<i>Using corporate contacts in Avaya Workspaces with Avaya Experience Platform™ (On-Prem + Connect)</i>	Using corporate contacts in Avaya Workspaces with Avaya Experience Platform™ (On-Prem + Connect)	Use the features and capabilities of the Corporate Contacts widget in Avaya Workspaces.	<ul style="list-style-type: none"> • Agents • Supervisors
Videos			
<i>Avaya Experience Platform™ (On-Prem + Connect) Application Center Administration</i>	Avaya Experience Platform™ (On-Prem + Connect) Application Center Administration	Administer Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> • Account administrators • Supervisors
<i>Using Avaya Experience Platform™ (On-Prem + Connect) for supervisors</i>	Using Avaya Experience Platform™ (On-Prem + Connect) for supervisors	Perform supervisor actions using Avaya Workspaces for Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> • Account administrators • Supervisors
<i>Using Avaya Experience Platform™ (On-Prem + Connect) for agents</i>	Using Avaya Experience Platform™ (On-Prem + Connect) for agents	Manage the features and capabilities of Avaya Workspaces for Avaya Experience Platform™ (On-Prem + Connect).	<ul style="list-style-type: none"> • Agents • Supervisors
<i>Getting Started with Avaya Workspaces for CRM for Avaya Experience Platform™ (On-Prem + Connect)</i>	Getting Started with Avaya Workspaces for CRM for Avaya Experience Platform™ (On-Prem + Connect)	Get an overview of Avaya Workspaces for CRM for Avaya Experience Platform™ (On-Prem + Connect) and manage interactions.	All audiences

Avaya Documentation Center navigation

For many programs, the latest customer documentation is available on the Avaya Documentation Center website at <https://documentation.avaya.com>. Some functionality is only available when you log in to the Avaya Documentation Center. The available functionality depends on your role.

Important:

If the documentation you are looking for is not available on the Avaya Documentation Center, you can find it on the [Avaya Support website](#).

While navigating through the Documentation Center, you can click the **Avaya Documentation Center** logo at the top of the screen to return to the home page anytime. On the Avaya Documentation Center, you can do the following:

- Click **Avaya Links** in the top menu bar to access other Avaya websites, including the Avaya Support website.
- Click **Languages** (🌐) in the top menu bar to change the display language and view localized documents.
- In the **Search Documentation** field, search for keywords and click **Filter** to filter by solution category, product, or user role.

You can select multiple items in each filter category. For example, you can select a product and multiple user roles.

- Click **Library** in the top menu bar to access the complete library of documents. Use the filtering options to refine your results.
- After performing a search or accessing the library, you can sort content on the search results page. When you find the item you want to view, click it to open it.
- Use the table of contents in a document for navigation. You can also click < or > next to the document title to navigate to the previous topic or the next topic.
- Click **Share** (➦) to share a topic by email or copy the URL.
- Download a PDF of the current topic in a document, the topic and its subtopics, or the entire document.
- Print the section you are viewing.
- Add content to a collection by clicking **Add to My Topics** (📌). You can add the topic and its subtopics or add the entire publication.
- View the topics in your collections. To access your collections, click your name in the top menu bar and then click **My Topics**.

You can do the following:

- Create, rename, and delete a collection.
- Set a collection as the default or favorite collection.
- Save a PDF of the selected content in a collection and download it to your computer.
- Share content in a collection with others through email.
- Receive collections that others have shared with you.
- Click **Watch** (👁) to add a topic to your watchlist so you are notified when the content is updated or removed.
- View and manage your watchlist by clicking **Watchlist** from the top menu with your name.

You can do the following:

- Enable **Email notifications** to receive email alerts.
- Unwatch the selected content or all topics.
- Send feedback for a topic.

Training

The following courses are available for Avaya Experience Platform™ (On-Prem + Connect):

Course code	Course title	Delivery type
30050W	Consulting and Demonstrating Avaya Experience Platform™ (On-Prem + Connect)	Web-based Training
60440W	Administering Avaya Experience Platform™ (On-Prem + Connect)	Web-based Training
60450W	Using Avaya Workspaces for Avaya Experience Platform™ (On-Prem + Connect) - Agents	Web-based Training
60470W	Using Avaya Workspaces for Avaya Experience Platform™ (On-Prem + Connect) - Supervisor	Web-based Training

Support

Go to the Avaya Support website at <https://support.avaya.com> for the most up-to-date documentation, product notices, and knowledge articles. You can also search for release notes, downloads, and resolutions to issues. Use the online service request system to create a service request. Chat with live agents to get answers to questions, or request an agent to connect you to a support team if an issue requires additional expertise.

Using the Avaya InSite Knowledge Base

The Avaya InSite Knowledge Base is a web-based search engine that provides:

- Up-to-date troubleshooting procedures and technical tips.
- Information about service packs.
- Access to customer and technical documentation.
- Information about training and certification programs.
- Links to other pertinent information.

If you are an authorized Avaya Partner or a current Avaya customer with a support contract, you can access the Knowledge Base without extra cost. You must have a login account and a valid Sold-To number.

Use the Avaya InSite Knowledge Base for any potential solutions to problems.

1. Go to <https://support.avaya.com>.
2. To log in, click **Sign In** at the top of the screen and then enter your login credentials when prompted.

3. Click **Product Support > Products**.
4. In **Search Product**, start typing the product name and then select the appropriate product from the list displayed.
5. Select the release number, if applicable.
6. Click the **Technical Solutions** tab to view articles for resolving technical issues.

Glossary

After Contact Work	After Contact Work (ACW) is an agent state that provides time for an agent to write notes about a completed interaction before Avaya Workspaces queues the next interaction. Account administrators configure the ACW time period in Application Center Administration.
Agent ID	A unique identification code for an Avaya Workspaces agent.
Agent state	A statement of the availability of agents. Agent states and state changes are visible to the agents and supervisors in Avaya Workspaces.
Alerting	A notification that informs the agents about incoming interactions in Avaya Workspaces.
Allowlist	A list of approved IP addresses, domains, or other entries for Avaya Experience Platform™ Public Cloud.
Avaya Cloud Office™	A collaboration tool that provides advanced calling features, video conferencing, and chat support. Avaya Cloud Office™ users can also invite third-party experts to collaborate on a project.
Avaya Spaces	A cloud-based solution designed for team collaboration with access to a personal meeting room, direct messaging, and group spaces. Avaya Spaces integrates multiple forms of communication, such as voice calls, video conferencing, and chat.
Avaya Workspaces	A browser-based application through which contact center agents handle inbound customer interactions. Avaya Workspaces supports voice, email, chat, and messaging interactions.
Barge in	A feature that enables supervisors to provide advice to agents in Avaya Workspaces. When barging in, a supervisor joins an interaction between the agent and the customer as an active third party. After the supervisor barges into the interaction, the customer, agent, and supervisor interact in a three-way conference.
Calculated metric	In Analytics for Avaya Experience Platform™ Public Cloud, a formula for data in a report. An advanced user can add calculated metrics to a standard historical report. By default, each historical report shows a

standard set of metrics. Advanced users can add additional metrics to make compound calculations based on standard measures.

Carousel

A type of interactive rich media message that features a number of horizontally scrolling images or panes. Carousel offers selectable options to an end customer. Custom development is required to build and show .json based rich media templates to agents on Avaya Workspaces. Using the custom built widget, agents can send carousel messages over the messaging channel.

Chat and messaging widget

In Avaya Workspaces, an interaction widget that contact center agents use to work on messaging and social media messaging interactions. Agents can use this widget to exchange messages and media with customers.

Chat with corporate contacts

In Avaya Workspaces, functionality to send messages to contacts and groups from the Chats and Groups tabs of the Corporate Contacts widget. The three types of chat are one-to-one chat, group chat, and conversation.

Coach

A feature that enables supervisors to provide advice to agents. After observing an interaction, the supervisor can coach an agent in Avaya Workspaces.

Connectors

A software connector that performs transfer of control, data among components, including but not limited to protocol and data conversion. They can also provide services, such as persistence, invocation, messaging, and transactions, that are independent of the interacting components functionality. The software connector acts as a proxy or wrapper around Avaya Experience Platform™ Public Cloud APIs that enable the underlying service to integrate with third-party providers and aggregators. While there are out-of-the-box connectors provided by Avaya as part of Avaya Experience Platform™ Public Cloud offering, customers can also build a custom messaging connector utilizing digital APIs to integrate Avaya Experience Platform™ Public Cloud with third-party gateways or providers.

Consult complete as conference

A feature that enables agents to add another agent to their customer call after a consultation call in Avaya Workspaces.

Consult complete as transfer

A feature that enables agents to transfer a customer call to another agent after a consultation call in Avaya Workspaces.

Consultation call

A call that Avaya Workspaces agents and supervisors can make to other agents, supervisors, or corporate contacts to request assistance during a call with the customer. After the consultation call, the agent or supervisor can transfer the call with the customer to the consulted experts or create a four-way conference with the experts, customer, and themselves.

Contact center	A business division within an organization that manages customer interactions. Contact centers are also known as call centers. Contact centers use advanced technology to help resolve customer issues quickly, track customer interactions, and capture interaction and performance data.
Contact Center as a Service	Contact Center as a Service (CCaaS) is a software deployment model that enables companies to purchase only the technology they need. Another vendor hosts their software to reduce IT, integration, and support costs. Avaya OneCloud™ CCaaS is the former name of Avaya Experience Platform™ Public Cloud.
Conversation	In Avaya Workspaces, a message exchange between the members of a user group or a channel on the Groups tab of the Corporate Contacts widget. The provider administrator manages user groups and channels.
Corporate Contacts widget	A widget in Avaya Workspaces that provides access to Avaya Cloud Office™, Avaya Spaces, and Microsoft Teams corporate contacts. Agents and supervisors can use the Corporate Contacts widget to consult available corporate contacts.
Cross-Origin Resource Sharing	The Cross-Origin Resource Sharing (CORS) protocol enables the communication between platforms hosted in different domains, such as ServiceNow and Avaya Experience Platform™ Public Cloud, through an Application Programming Interface (API). CORS rules define the domains that can exchange the Representational State Transfer (REST) API requests with ServiceNow.
Custom group	In Analytics for Avaya Experience Platform™ Public Cloud, a data segmentation for historical reports. Account administrators can define a group based on common attributes, such as channel or queue. On a historical report, account administrators can show only the data that applies to a custom group.
Custom metric	In Analytics for Avaya Experience Platform™ Public Cloud, an additional measure in a report. An advanced user can add custom metrics to a standard historical report. By default, each historical report shows a standard set of metrics. Advanced users can add additional metrics to show more refined data.
Customer identifier	In Avaya Social Connections, a primary contact detail that uniquely identifies an end user. For example, when an end user sends a message to a WhatsApp business account, the phone number is the primary customer identifier of the end user.
Customer Relationship Management	Customer Relationship Management (CRM) is when a business or other organization administers its interactions with customers, typically using data analysis to study large amounts of information. CRM refers to all the processes and tools that manage customer relationships.

Salesforce, ServiceNow, and Microsoft Dynamics® 365 are examples of CRM software.

Digital interaction

A type of interaction, which can be one of the following:

- Email with the customer's query
- Chat initiated on the web
- Social media messaging

Digital Library

In Avaya Workspaces, a widget that consists of global templates and templates associated with agent queues. Account administrators can configure the templates in Application Center Administration. Agents can use Digital Library templates in messaging interactions with customers.

Disposition code

A label that the agents can attach to an interaction to describe or categorize it. Disposition codes are tags that help agents and other users summarize and flag interactions that require follow-up.

Events

In Automation and Orchestration, an event is a change during the routing of an Avaya Experience Platform™ Public Cloud interaction. Each event has a schema that contains data that the workflows use to make routing decisions.

Facebook account

A Facebook-related Meta business account of the customer. Account administrators can use a customer's Facebook account to set up their Facebook and WhatsApp social accounts on Avaya Social Connections.

Group chat

A chat with more than one corporate contact that Avaya Workspaces agents and supervisors can have on the Chats tab of the Corporate Contacts widget. Agents and supervisors cannot start a group chat, but they can send group chat messages to the chat groups that contacted them.

Inbound

A voice call, messaging, or an email initiated by an end customer and directed to a company's contact center. These incoming interactions are handled through automation and help desk agents in inbound contact centers. Inbound contact centers focus on providing high level customer service and efficient contact routing to reduce wait times.

Incoming connection

In Automation, an incoming connection provides information to a task. Each task has one incoming and at least one outgoing connection. An incoming connection can receive data passed to it from another task.

Integration

A concept that enables two or more software or components to work together and exchange data and capabilities. Avaya Experience Platform™ Public Cloud integrates with third-party applications and other Avaya products to expand its functionality. For example, Avaya

Workspaces integrates with Salesforce to provide contact center features to enterprises with CRM software.

Interaction

A request for help from customers. An interaction can also consist of customer queries or sales inquiries. There are several types of interactions based on how customers request help. Customers can request help by the following channels:

- Email: Sending an email containing their query.
- Webchat: Initiating a chat on your website.
- Social media messaging: Messaging using Facebook, X (Twitter), and WhatsApp.
- Voice: Making a call using a WebRTC audio application.

Interaction details

A user interface element that enables agents to see details of an ongoing interaction in Avaya Workspaces for CRM.

Internal extension call

A type of phone call that agents and supervisors use for internal communication. For example, with an internal extension call, a supervisor can call an agent about the work schedule, or an agent can call the supervisor to discuss issues related to appraisal.

Interval

In Analytics for Avaya Experience Platform™ Public Cloud, a specific time period. When supervisors and account administrators generate reports to show contact center performance, they specify an interval, such as between 09:00 and 17:00. The report shows the performance for that time period.

Layout

An experience that Avaya Workspaces users receive when they are using the application. Layouts contain widgets and UI arrangements that are presented to agents or supervisors for each of the supported channels.

Mapping

In Automation, a mapping is a set of answers, with their variations, to questions. For example, the answer to a question could be yes or no. With a mapping table, the customer can provide a variation of an answer and it is still valid in the flow. A strong mapping has variations of the answer, including colloquial words, such as yes, yeah, yep, y, and so on.

Metric formula

In Analytics for Avaya Experience Platform™ Public Cloud, a calculation performed on any data in the contact center database. Metric formulas are the objects and operators that make up those calculations. Analytics for Avaya Experience Platform™ Public Cloud includes some common calculations, and advanced users can create their calculations.

Microsoft Teams

A business messaging and collaboration platform that provides access to channels and teams, direct messaging, and group chats. Microsoft Teams

also integrates with other Microsoft 365 platforms, including Dynamics 365 applications.

Microsoft Teams channel

A type of user group that exists in Microsoft Teams. Agents and supervisors can see the list of available Microsoft Teams channels and users on the Groups tab of the Corporate Contacts widget in Avaya Workspaces.

Outbound

An adhoc outgoing voice call or an email initiated by a contact center agent to the end customer. The members of a sales team or customer service representatives make these interactions to customers.

Outgoing connection

An output connection of a task in Automation. You can use the task output as an input to another task.

P-Intrinsics

In Automation, a SIP header with a hex encoded string in the format name=value pairs about the session. The applications that receive a SIP header may process the information differently to Automation.

Pop-out

A presentation of the external web pages provided by a screenpop that agents can use for completing tasks. For example, agents can view external websites with the information on current currency exchange rates.

Postback

A type of interactive rich media message that enables an end customer to click a button to send a response or selection. Custom development is required to build and show `.json` based rich media templates to agents on Avaya Workspaces. Using the custom built widget, agents can send postback messages over the messaging channel.

Producer

In Analytics for Avaya Experience Platform™ Public Cloud, a collection of measures to provide real-time contextual data to Avaya Workspaces supervisors and account administrators. Analytics for Avaya Experience Platform™ Public Cloud provides the following producers to Avaya Workspaces for use in real-time reporting dashboards: Agent, AgentByChannel, AgentByQueue, Channel, DialogDetail, Group, Queue, and QueueByChannel.

Profiles

In Application Center Administration, a collection of configuration settings assigned to a user. In Avaya Experience Platform™ Public Cloud, account administrators create a profile at an account or an account hierarchy level and assign it to users, such as agents and supervisors.

Provider for corporate contacts

A third-party application that Avaya Experience Platform™ Public Cloud integrates with, such as Avaya Cloud Office™, Avaya Spaces, or Microsoft Teams. Agents and supervisors can see the provider contacts available for consulting on the corresponding tab of the Corporate Contacts widget.

Redirection on No Answer	Redirection on No Answer (RONA) is a feature for redirecting a call after an administered number of rings. RONA prevents an unanswered call from ringing indefinitely.
Report type	In Analytics for Avaya Experience Platform™ Public Cloud, supervisors and account administrators obtain data on the performance of contact center agents using three types of reports. Real-time reports provide information about current activity. Historical reports provide information about past activities. Historical dossiers provide information about past activity with interactive graphics.
Representational State Transfer API	A Representational State Transfer (REST) API is a set of rules that enables different software applications to communicate over the web. A REST API uses standard web protocols, making it widely used for sharing data and functionality in web development.
Restricted account	A locked account is the result of disciplinary action from Facebook after the account holder violates its community standards or policies. The nature of the restriction depends on the infraction, ranging from temporarily stopping users from commenting on posts to a full account lockout.
Retrieve credentials	In Avaya Social Connections, an action that account administrators perform while creating or managing social media accounts. For example, when account administrators add a Facebook or WhatsApp social account on Avaya Social Connections, they use this option to complete the authentication process with the social media provider.
Roll-up	A form of time-based data aggregation in Analytics for Avaya Experience Platform™ Public Cloud. When supervisors and account administrators generate reports to show contact center performance, they can show daily or monthly data. This data is also referred to as roll-up data.
Routing rules	In Orchestration, workflow routing is based on rules. You can use rules to initiate a workflow based on the information in incoming events.
SAML	Security Assertion Markup Language (SAML) is a protocol that enables you to access multiple web applications using one set of user credentials. Avaya Experience Platform™ Public Cloud supports the standard browser redirect-based SSO using the SAMLv2 protocol.
SAML Identity Provider	A system entity that issues authentication assertions in conjunction with a single sign-on profile of SAML.
Self service	In Automation, a self-service flow is one where the caller does not interact with an agent. Self-service flows collect information for queues, attributes, and customer identification.

SLA	Service Level Agreement (SLA) is an industry term that defines a level of service you expect, with the metrics by which the service is measured, and remedies or penalties should agreed-on service levels not be achieved. It is a critical component of any technology contract.
Softphone	A telephony application that is installed on a computer.
Station ID	A unique identifier that displays the internal extension number assigned to a voice enabled agent.
Supervisor dashboard	A screen that enables supervisors to monitor agents. Supervisors can view a list of agents and the information about the state and interactions of an agent, use filters to search agents in a team, end sessions, disconnect calls, and broadcast messages. From the supervisor dashboard, supervisors can also observe, coach, and barge into chat, messaging, and voice interactions.
Task output	An output connection of a task in an Orchestration workflow. It is a visual representation of how the workflow will progress. You can use a task output as an input to another task.
Threshold	A level of service in Analytics for Avaya Experience Platform™ Public Cloud. Below this level, contact center customers do not receive a satisfactory response. Above this level, customers have a positive experience. Supervisors and account administrators can add a threshold to each measure in a real-time report. For real-time reports, this functionality is called Thresholds Classes. For historical reports, account administrators can also assign thresholds to more accurately manage Service Level Agreements (SLAs).
Threshold class	In Analytics for Avaya Experience Platform™ Public Cloud, an assignment of thresholds to measures in Avaya Workspaces for real-time reports.
UX Profiles	In Application Center Administration, UX profiles contain a number of settings that manage user experience in Avaya Workspaces, including the Avaya Workspaces layout. UX profiles are selected as part of user profiles which are used when creating users in Avaya Experience Platform™ Public Cloud.
Voice interaction	A voice interaction is a phone call from customers in Avaya Workspaces. Avaya Experience Platform™ Public Cloud voice services provide the functionality to route and control voice interactions.
Wait treatment	A message or audio that the customer receives while they are in the queue waiting to be connected to an agent.

WhatsApp business account

A WhatsApp business platform account that represents the customer's business. Customers can use their WhatsApp business accounts to create a WhatsApp social media account on Avaya Social Connections.

WhatsApp template

A message format in WhatsApp that agents can use to engage in marketing, utility, and authentication conversations with customers. Agents can use plain text, button, macro, or media template types.

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