

Configuring Record Viewer in Microsoft Dynamics

The record viewer allows you to view chat transcripts and listen to call recordings archived in the Puzzel application. It is a passive tool which simply permits you to access the archive after having authenticated into the Puzzel Application. By making the records available within Dynamics, the agents can go through the previous interactions with the customer and provide a greater customer service.

Overview

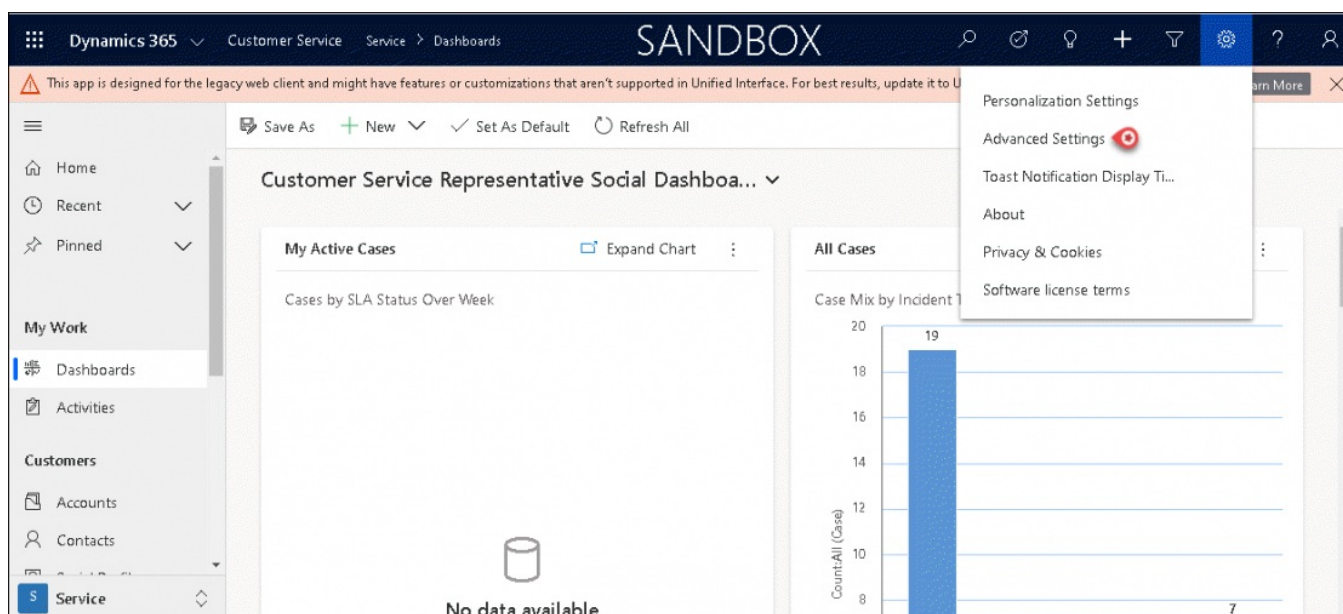
In this document, you will be able to understand how to configure the record viewer within Microsoft Dynamics. This is done in 2 steps as listed below:

1. Add script to Dynamics Web Resources
2. Customize the Phone Call form
3. Customize the Task form

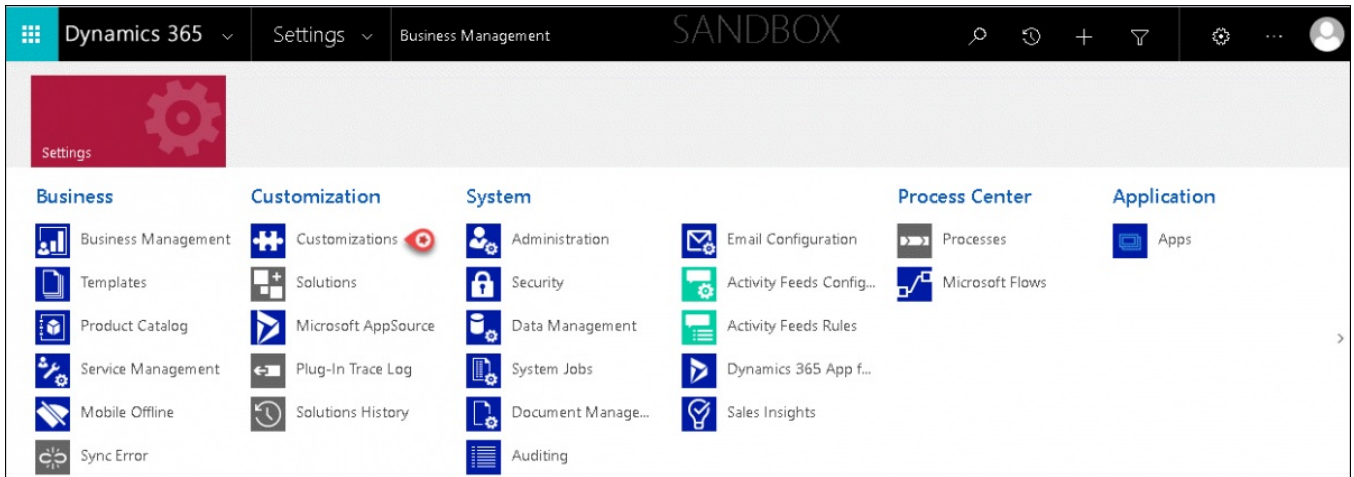
Configuring Record Viewer in Microsoft Dynamics

To configure the Puzzel Record Viewer, you need to:

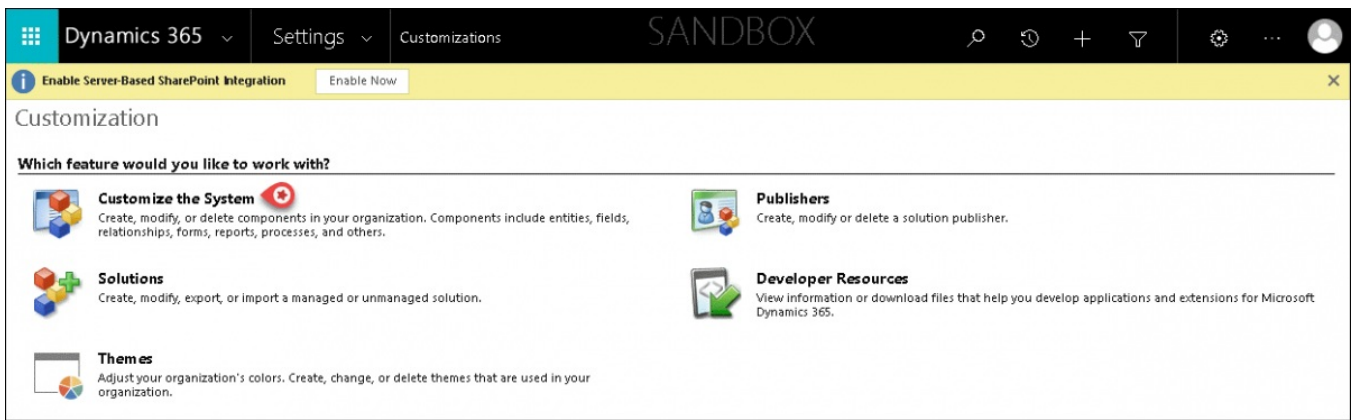
1. Click on the **Settings** icon in the top toolbar on the right corner of your screen and select **Advanced Settings**



2. Expand the **Settings** option and select **Customizations** in the Customization list



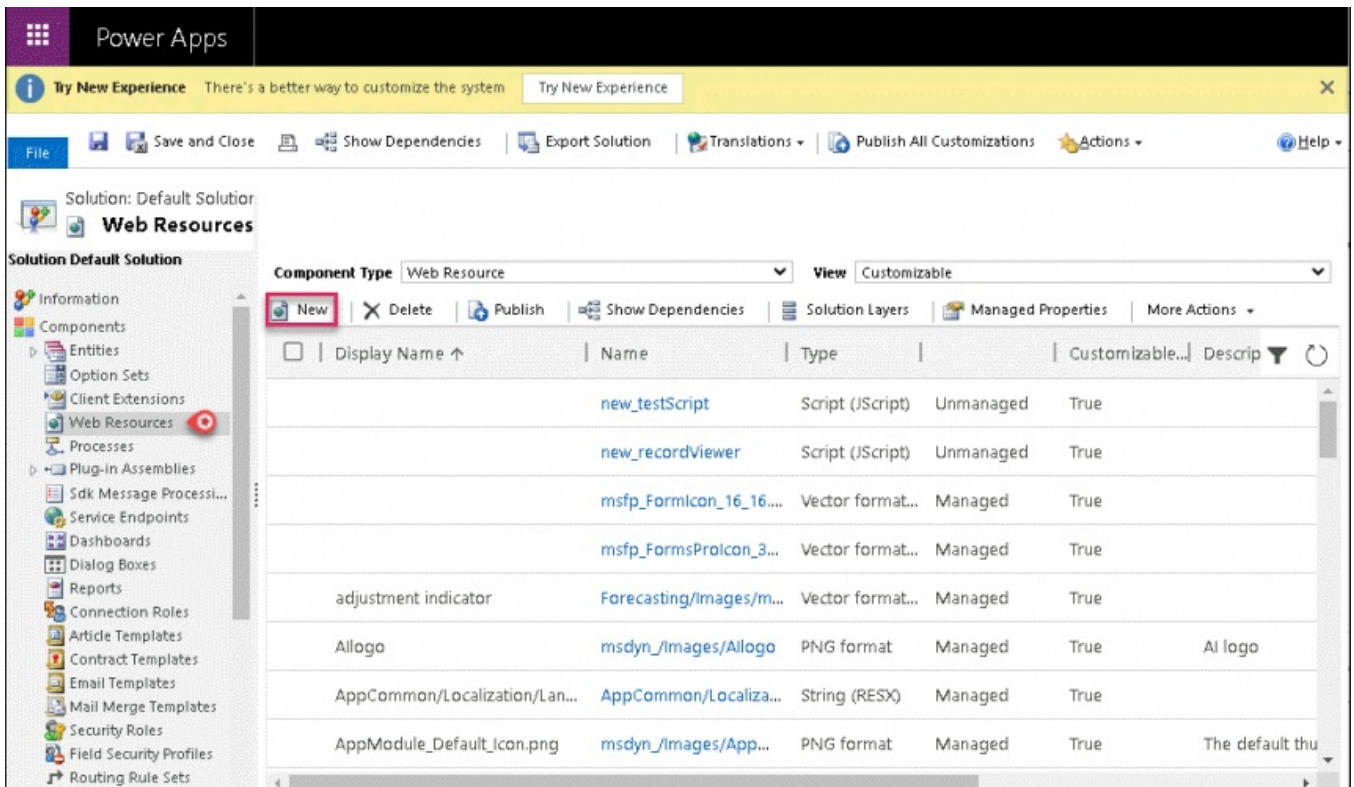
3. Click on **Customize the System** option to open the Power Apps window



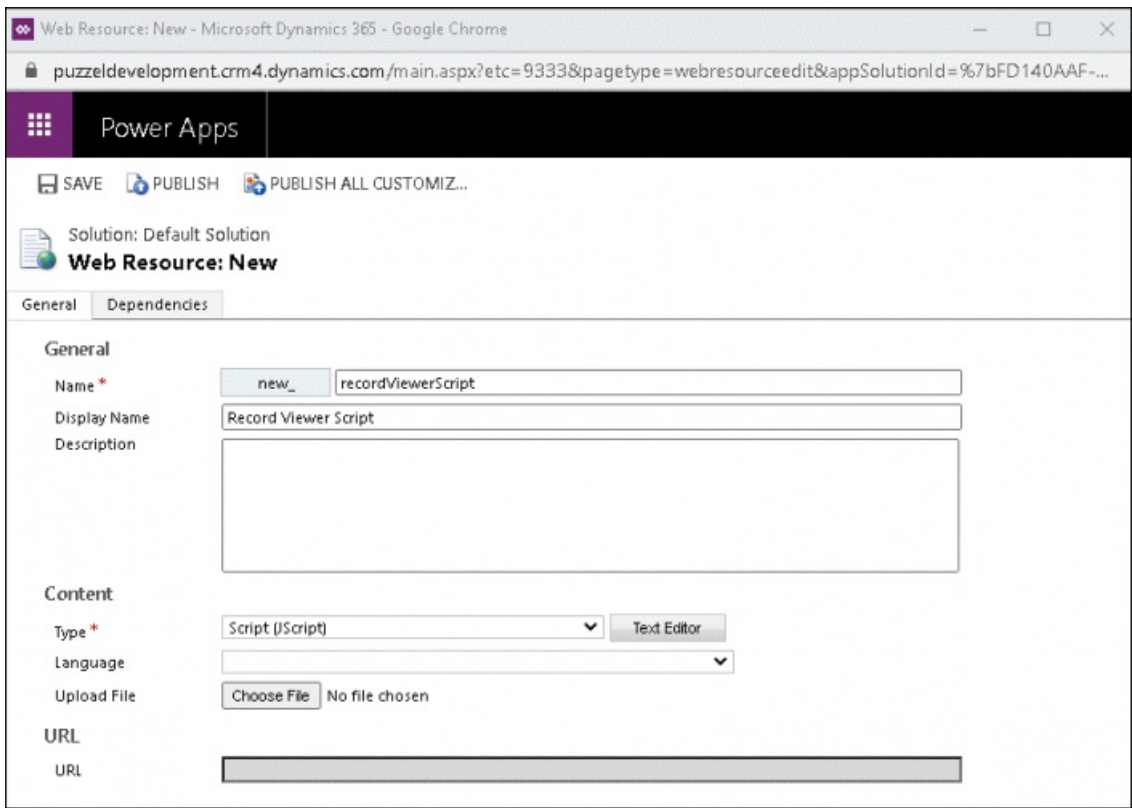
Add script to Dynamics Web Resources

Follow the steps listed below to add script to a new Dynamics Web Resource.

1. From the tree structure on the left, select **Web Resources** under **Components** and click on New to create a new resource



2. Enter recordViewerScript for the **Name** parameter and select Script in the drop-down menu for **Type** and click on **Text Editor**



3. Paste the below code snippet in the editor and click **OK**

```
function recordViewer(executionContext) {
    if (!executionContext) {
        console.log("Context is not provided!");
        return;
    }
}
```

```

}
var formContext = executionContext.getFormContext();

var description = formContext.getAttribute("description").getValue();

if(!description) {
    return;
}

var IFrame = formContext.ui.controls.get("IFRAME_RecordViewer");

if (!IFrame) {
    console.log("There is no IFrame with name 'IFRAME_RecordViewer' in the form!");
    return;
}

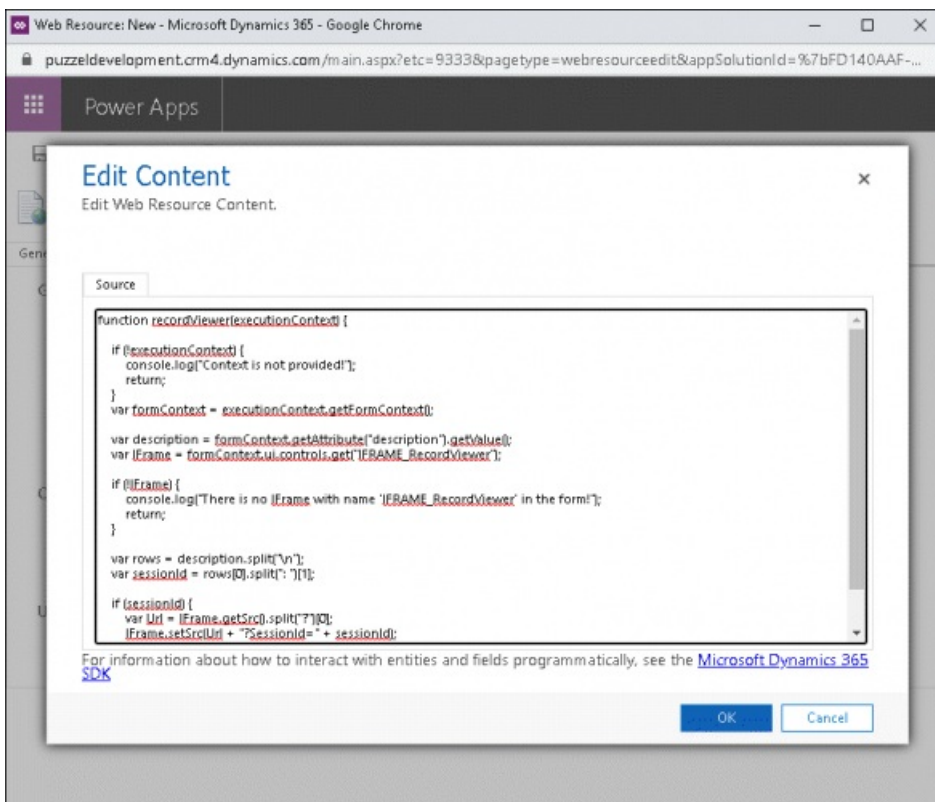
var rows = description.split("\n");

if(!rows || !rows[0]) {
    return;
}

var sessionId = rows[0].split(": ")[1];

if (sessionId) {
    var Url = IFrame.getSrc().split("?")[0];
    IFrame.setSrc(Url + "?SessionId=" + sessionId);
}
}

```



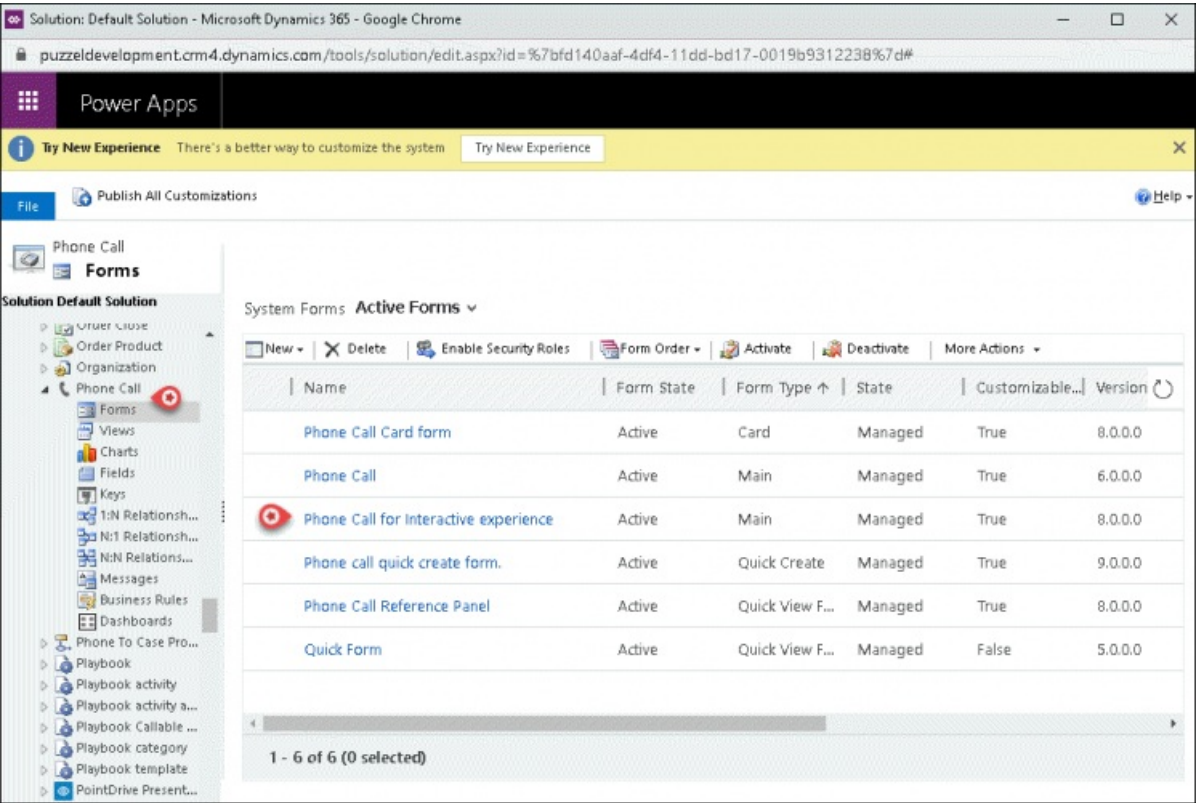
4. Save, Publish, and close the window

Customize the Phone Call form

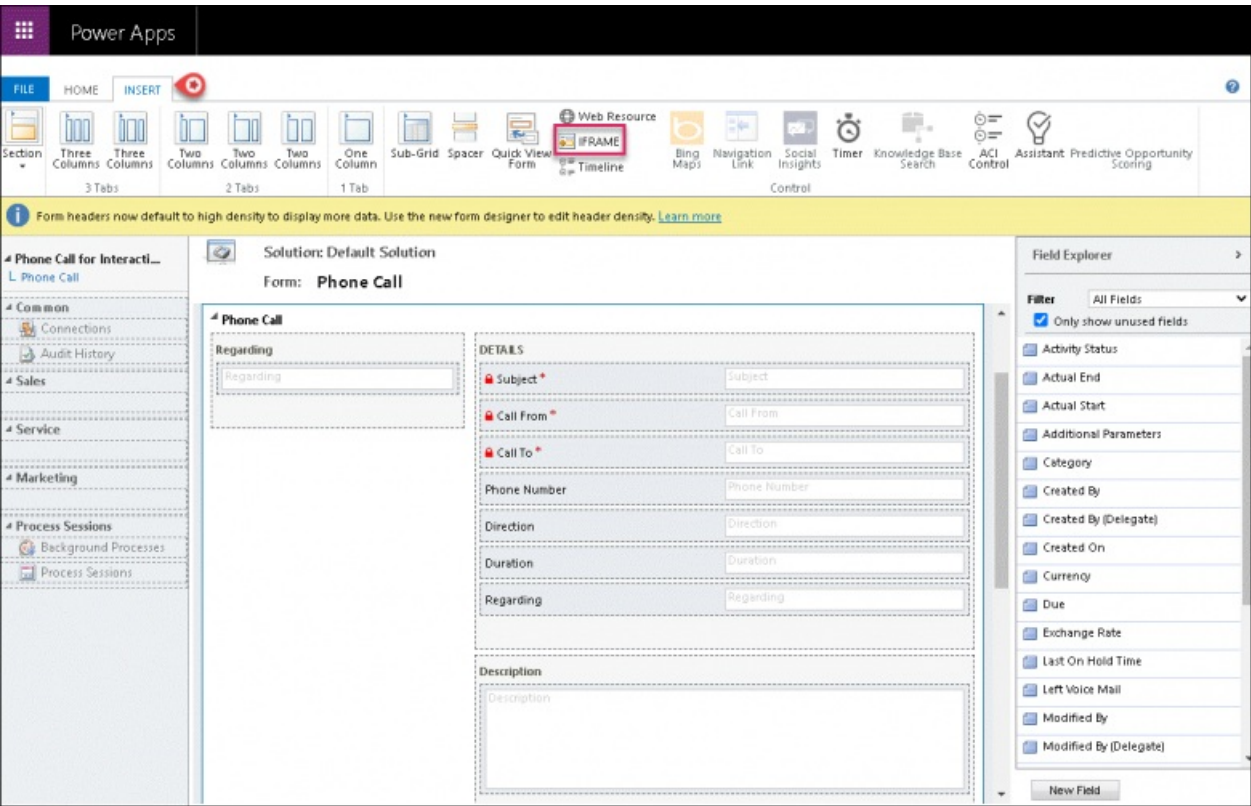
Do the following to customize the Phone Call form:

1. From the tree structure on the left, select Entities -> Phone Call -> Forms and click on the **Phone Call for Interactive**

experience option



2. In the top menu, select**Insert** tab and pick **Iframe** option as shown in the picture below



3. In the **Add an Iframe** window, enter the values to the parameters as described in the table and click**OK**

Parameter	Value
-----------	-------

Parameter	Value
Name	IFRAME_RecordViewer
URL	https://prod-paa-widgets.puzzel.com/crv/
Label	Record Viewer

Add an IFRAME

Add a new IFRAME to the Form.

General

Formatting

Dependencies

Name

Specify a unique name.

Name *

IFRAME_RecordViewer

URL *

<https://prod-paa-widgets.puzzel.com/crv/>

☐
 Pass record object-type code and unique identifier as parameters.

Label

Specify the label for this field in forms.

Label *

RecordViewer

☐
 Display label on the Form

Security

Select whether to restrict cross-frame scripting.

☒
 Restrict cross-frame scripting, where supported.
 [For more information, click here.](#)

OK

Cancel

4. In the top menu, select the**Home** tab and click on **Form properties** option.

FILE

HOME

INSERT

Save

Save As

Save and Close

Publish

Change Properties

Remove

Undo

Redo

Body

Header

Footer

Navigation

Business Rules

Form Properties

Preview

Form

Enable Security Roles

Show Dependencies

Managed Properties

Merge Forms

Upgrade

- In the Form Properties window, navigate to the**Events** tab and click the add button
- In the Lookup Record window, search for**new_recordViewerScript** and click **Add**

Form Properties
Modify this form's properties.

Lookup Record
Enter your search criteria.

Look for: Web Resource
Look in: WebResource Lookup View F
Search: new

Name	Display Nam...	Language
new_testScript		English(1033)
new_recordViewer		
new_sdfsd		
<input checked="" type="checkbox"/> new_recordViewerScript	Record View...	

1 - 4 of 4 (1 selected) Page 1

New Add Cancel Remove Value OK Cancel

- In the Event Handlers section, select Form in the drop-down options for the Control parameter and OnLoad for the Event parameter.

Form Properties
Modify this form's properties.

Events Display Parameters Non-Event Dependencies

Add Remove Up Down Edit

Name	Display Name	Description
new_recordViewerScript		

Event Handlers
Manage functions that are called for form or field events.

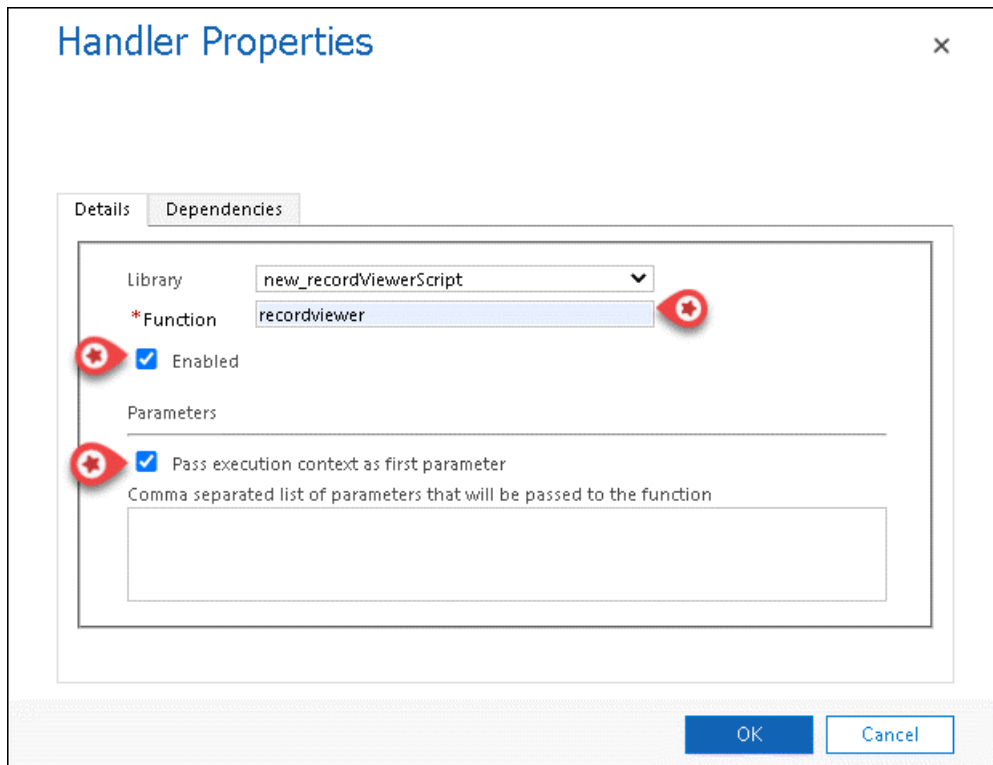
Control: Form
Event: OnLoad

Add Remove Up Down Edit Edit Library

Library	Function	Enabled
---------	----------	---------

OK Cancel

- Click on the Add button to open the Handler Properties window. Enter RecordViewer for the **Function** parameter and tick **Enabled**. Under Parameters section, check **Pass execution context as first parameter** and click **OK**



9. Save, Publish, and close the window.

Customize the Task form

Do the following to customize the Task form:

1. From the tree structure on the left, select Entities -> Task ->Forms
2. click on the **Task for Interactive experience**.
3. Repeat steps 2 through step 9.

After completing the steps, you will be able to see the record viewer component in Microsoft Dynamics as shown in the picture below

