



BeneVoice for Dynamics 365 Configuration guide



BeneVoice for Dynamics 365 Configuration Guide



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1 Microsoft Dynamics 365 tenant level configuration

The guide applies to BeneVoice for Dynamics 365 version 1.0 onwards.

1.1 Installation Prerequisites

- A functioning Microsoft Dynamics 365 tenant with the needed Dynamics 365 target instances (environments) for installation.
- Microsoft Dynamics 365 Unified Interface (Online version).
- Required suitable Microsoft Dynamics 365 licenses for Customer service (CIF 1.0) or Omnichannel use (CIF 2.0). <u>https://dynamics.microsoft.com/en-us/pricing/customer-service/#plans</u>
- Install Channel Integration Framework in your target environment (CIF 1.0)

Note: Please send your Microsoft Dynamics 365 environment URL-information to your Benemen contact before the installation.

1.1.1 Setting up the Channel Integration Framework without Omnichannel (CIF 1.0)

• This setup is used for customers that are using the single-session Dynamics 365 modeldriven apps, such as:

Dynamics 365 Customer Service Dynamics 365 Sales Dynamics 365 Project Service



Dynamics 365 Field Service

Install Channel Integration Framework in your target environment
 <u>https://docs.microsoft.com/en-us/dynamics365/customer-service/channel-integration-</u>

| framework/ | 'get-channel | -integration- | framework |
|------------|--------------|---------------|-----------|
| | 0 | | |

| | 🧰 ~ S | etting | S 🗸 Business Mana | gemen | <u>k</u> | | | | | | | | |
|----------|--|------------|----------------------------------|-----------|------------------------------|-------------|--------------------------|----------------------------------|-----------------------|------|-------------------|-------------|-------------------------------------|
| Settings | Ö | | | | | | | | | | | | |
| Busine | ess | Cust | tomization | Syst | em | | | | | Exte | ensions | Application | n |
| . | lusiness Manageme | ++- | Customizations | 20 | Administration | Ľ3 | Email Configuration | 2 | Organization Insights | | Data Imports | Apps | |
| | Templates | | Selden | 4 | Security | 5 | Activity Feeds Confi | | | + | Targets | 24. 23 | |
| P | Product Catalog | D | Microsoft AppSource | Ξ, | Data Management | | Activity Feeds Rules | | | | Vendors | | |
| 1/0 5 | Service Manageme | - | | | System Jobs | D | Dynamics 365 App f | | | ÷ | Customer Care Mod | | |
| N | Mobile Offline | 3 | Solutions History | Г. | Document Manage | ۵, | Data Export | | | ÷ | Account domains | | |
| ¢þ s | iync Error | | | | Auditing | Ŷ | Sales Insights | | | Ŧ | Cases Invoiced | | |
| | Sites Create new sites or office is | postions a | where service operations take p | ace. Add | and remove resources, change | site inform | ration, or delete sites. | | | - | | | Subjects Manage the subject |
| 2 | Currencies Add new currencies or cha | nge the ei | schange rates for existing curre | nces. | | | | | | | | 5 | Connection R Create, edit, and d |
| - | Relationship Roles Manage the candood sports users can apply when they define real candido roles between accounts, contaccs, and opportunities. | | | | | | 5=7 5=5 5+5 | Automatic Re Create and manag | | | | | |
| Þ | Rollup Queries Go to your list of Rolup Q | ueries tra | it you can use to gather data ao | out a pro | up of related records. | | | | | | | in | LinkedIn Sale Manage settings r |

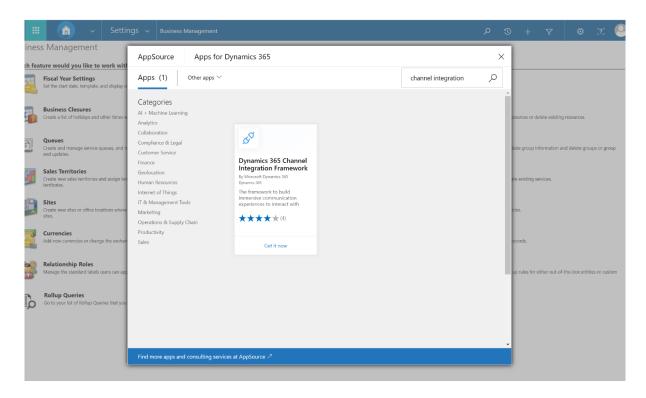


Figure 1 AppSource Dynamics 365 Channel Integration Framework



Office 36

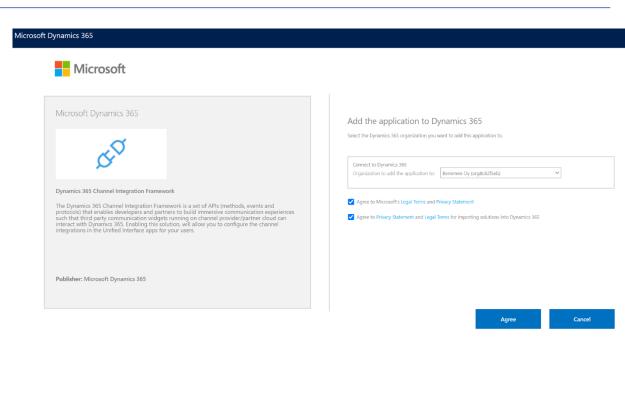


Figure 2 Agree to Terms

| i crosoft Dyn | amics 365 | | | | |
|-----------------------------|-------------------|-------------------|----------------------|---|--------------|
| elcome | | | | | |
| ciconic | | | | | |
| CES UPDATES SERVIC | CE HEALTH BACKU | IP & RESTORE APP | LICATIONS | | |
| age your solutior | าร | | | | |
| | | | | | |
| Manage your s | solutions | | | | |
| indiago jour i | or a constraints | | | | |
| Select a preferred s | olution to mana | ae on selected ir | nstance: Benemen C |)v | |
| protect a protection of | | geonocice | | -) | |
| SOLUTION NAME | VERSION | AVAILABLE UNTIL | STATUS | | |
| Al Builder for SharePoint F | 2020.7.16.3 | 1/1/2050 | Not installed | Channel API Integrat. | |
| Anchor solution for Dual . | 1.0.22 | 1/1/2050 | Not installed | j | |
| Channel API Integration Fi | r 9.1.0.420 | 1/1/2050 | Installation pending | Please wait while installation start take a few minutes. | ts. This may |
| Common Data Service Bas | s 9.2.2006.10 | 1/1/2050 | Not installed | Bring your communication channels a | nd build |
| Common Data Service Sta | ir9.2.2006.10 | 1/1/2050 | Not installed | immersive experience with Dynamics | |
| Contextual Help Base | 1.0.0.12 | 1/1/2050 | Installed | Created by: Microsoft | ,ơ |
| Core Service Scheduling | 9.0.20103.1007 | 1/1/2050 | Not installed | Learn more | Q. |
| Crm Hub | 1.0.20170908.55 | 1/1/2050 | Upgrade available | | |
| Customer Service Team M | 9.0.20094.3061 | 1/1/2050 | Not installed | | |
| Data Export Service for Dy | r 1.0.0.0 | 1/1/2021 | Installed | | |
| Dynamics 365 Connector | f 1.13.10034.1003 | 1/1/2030 | Not installed | | |
| Dynamics 365 Customer I. | 0.7.19 | 1/31/2029 | Not installed | | |
| Dynamics 365 Customer V | / 2.0.0.8 | 1/1/2050 | Upgrade available | | |
| Dynamics 365 Finance and | d 2.0.777.493 | 1/1/2050 | Not installed | | |
| Dynamics 365 for Marketi | 1.35.10067.1044 | 1/1/2030 | Not installed | | |
| 14 4 F FI | | | | | |

Figure 3 Install Channel Integration API



1.1.2 Setting up the Channel Integration Framework for Omnichannel use (CIF 2.0)

- This setup is for the customers that use Omnichannel capabilities in Dynamics 365 and have the Omnichannel licenses (e.g. Omnichannel for Customer Service).
- Provisioning of Omnichannel

https://docs.microsoft.com/enus/dynamics365/omnichannel/administrator/omnichannel-provision-license

1.2 Configure Azure app registration

For BeneVoice to work, an Azure App registration is needed for authentication purposes. Giving access to your D365 though an Azure App registration does not consume D365 licenses.

Configuring Azure App registrations is done by the following steps:

- Sign in to Azure portal (<u>https://portal.azure.com</u>)
- From the navigation menu, choose Azure Active Directory and Application registration
- Choose New Registration from top of the page



| Microsoft Azure | P Search resources, services, and docs (G+/) | | E E P @ ? | patrik.vaskivuori@bene |
|-------------------------------|---|--|-------------------------------------|---|
| Home > Benemen Oy | | | | |
| Benemen Oy App | registrations 🖈 | | | × |
| Overview | + New registration 🕀 Endpoints 🤌 Troubleshooting 🛓 Download 📾 Preview features 🛇 Got feedback? | | | |
| 🛒 Getting started | | | | × |
| Preview hub | (1) Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Azure AD Graph. We to be upgraded to Microsoft Authentication Library (MSAL) and Microsoft Graph. Learn more | will continue to provide technical support and security up | odates but we will no longer provid | e feature updates. Applications will need |
| X Diagnose and solve problems | | | | |
| Manage | All applications Owned applications | | | |
| Lusers | P Start typing a name or Application ID to filter these results | | | |
| A Groups | Display name | Application (client) ID | Cre | ated on Certificates & secrets |
| External Identities | M-Files reader | | 10/ | 22/2018 - |
| 👃 Roles and administrators | Benemen Authenticator App | | 8/2 | 0/2019 - |
| Administrative units | | | | |
| Enterprise applications | | | | |
| Devices | | | | |
| App registrations | | | | |
| Identity Governance | | | | |
| Application proxy | | | | |
| Licenses | | | | |
| Azure AD Connect | | | | |
| Custom domain names | | | | |
| Mobility (MDM and MAM) | | | | |
| Password reset | | | | |
| Company branding | | | | |
| User settings | | | | |
| Properties | | | | |
| Security | | | | |

Figure 5 App registrations

• Fill in a name, for example BeneVoice for the app registration.

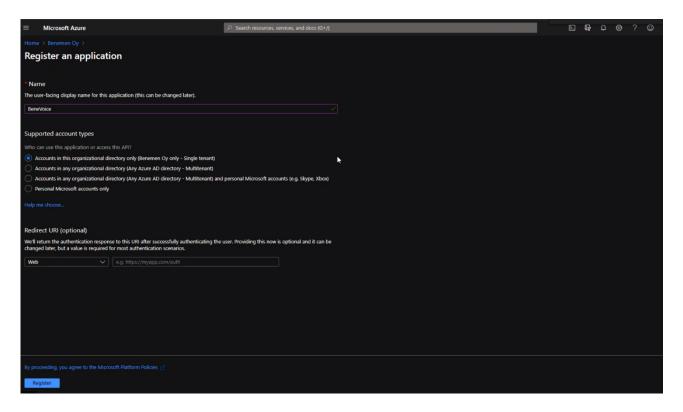


Figure 6 Register an application



- All the other settings can be left as default. Choose Register.
- Once deployment is done, you should see a similar window than below:

| - MICLOSOIT AZULE | Ze Search resources, service | es, and does (O*77 | r a t |
|------------------------------------|--|--|---|
| Home > Benemen Oy > | | | |
| 🜉 BeneVoice 🖉 | | | |
| | 💼 Delete 🌐 Endpoints 🔜 Preview features | | |
| 😽 Overview | Got a second? We would love your feedback on Microsoft identity plat | form (previously Azure AD for developer). | |
| Quickstart | | | |
| 🛒 Integration assistant Preview | Display name : BeneVoice | | Supported account types : My organization only |
| Manage | Application (client) ID: | ► | Redirect URIs : Add a Redirect URI |
| Branding | Directory (tenant) ID : | | Application ID URI : Add an Application ID URI |
| Authentication | Object ID : | | Managed application in I : BeneVoice |
| Y Certificates & secrets | Welcome to the new and improved App registrations. Looking to learn | how it's changed from App registrations (Legacy)? Learn more | |
| Token configuration | | | |
| API permissions | | | ph. We will continue to provide technical support and security updates but we will no longer pr |
| 🌰 Expose an API | need to be upgraded to Microsoft Authentication Library (MSAL) and M | Microsoft Graph. Learn more | |
| 🜇 Owners | | | |
| Roles and administrators Preview | Call APIs | | Documentation |
| Manifest | | | |
| Support + Troubleshooting | - 🚱 💼 🃜 | | Authentication scenarios Authentication libraries |
| Troubleshooting | | | Code samples Microsoft Graph |
| New support request | | | Glossary Help and Support |
| | Build more powerful apps with rich user and business data from Microsoft services and your own company's data sources. | | |
| | View API permissions | | |
| | | | |
| | | | |
| | Sian in users in 5 minutes | | |

Figure 7 Registration done

- App registration needs API permissions to be able to authenticate to your Dynamics 365 enviroment. Choose API permissions from the navigation panel.
- Choose Add a permission
- Select Dynamics CRM from the pop-up window:



| \equiv Microsoft Azure | | \mathcal{P} Search resources, services, and docs (G+/) | | | E 🗣 🖓 | 🕸 ? 🙄 |
|--|--|--|--|---|---|---|
| Home > Benemen Oy > BeneVoice | missions 🖉 | | | Request API permission | 15 | |
| Search (Ctrl+/) « Overview Quickstart funtegration assistant Preview Manage Branding Authentication | Refresh Got feedback? Configured permissions Applications are authorized to call APIs | when they are granted permissions by users/admins as j s. Learn more about permissions and consent in consent for Benemen Cy Type Description | art of the consent process. T Admin cor | lake auvalitage of the trem | n uses My APIs endoos amount of data in Office 363. Enterprise ne, Outlook/Eschange, OneDine, OneNote, Sh | |
| Certificates & secrets Token configuration API permissions | | Delegated Sign in and read user profile | | Integrate with Azure DevOps and Azure DevOps server | Manage your key vaults as well as the keys, secrets, and certificates within your Key Vaults | Allow validated users protected content |
| Arr permissions Depose an API Owners Roles and administrators Preview Manifest | | | | Azure Service Management Programmatic access to much of the functionality available through the Azure portal | Arure Storage Secure, massively scalable object and data lake storage for unstructured and semi-structured data | Data Export So Microsoft Dyn Export data from Micro CRM organization to a destination |
| Support + Troubleshooting Troubleshooting New support request | | | | Programmatic access to data and functionality in Dynamics 365 Business Central | CPynamics CRM Access the capabilities of CRM business software and ERP systems | Flow Service Embed flow templates |
| | | | | Programmatic access to Intune data | Office 365 Management APIs Retrieve information about user, admin, system, and policy actions and events from Office 365 and Azure AD activity logs | Create and manage n files, and more in One |
| | | | | Power BI Service | PowerApps Runtime Service | SharePoint |

Figure 8 API permissions

• Tick user_impersonation selection and choose Add permissions

| | | | | | Z | G 🗘 🖗 | ≩ ? ☺ | patrik |
|---|---------------------------------|---|----------|---|-----|--------------------|-------|--------------|
| Home > Benemen Oy > BeneVoice | missions 🖉 | | | Request API permissions | | | | |
| Search (Ctrl+/) « | 🕑 Refresh 🛇 Got feedback? | | | Dynamics CRM https://admin.services.crm.dynamics.com/ Docs of | | | | |
| Overview Quickstart Integration assistant Preview | | hen they are granted permissions by users/admins as part of the consent p Learn more about permissions and consent | | What type of permissions does your application require? Delegated permissions Your application needs to access the API as the signed-in user. | | Application permis | | |
| Manage | + Add a permission 🗸 Grant admi | n consent for Benemen Oy | | | | signed-in user. | | |
| Branding | API / Permissions name | Type Description A | dmin cor | Select permissions | | | | |
| Authentication | | | | ${\boldsymbol {\mathcal P}}$ Start typing a reply url to filter these results | | | | |
| Y Certificates & secrets | | Delegated Sign in and read user profile - | | Permission | | | Admin | n consent re |
| tit Token configuration | | | | V Permissions (1) | | | | |
| API permissions | | | | | | | | |
| 📤 Expose an API | | | | user_impersonation ① Access Common Data Service as organization user | rs. | | | |
| Sources | | | | | | | | |
| Roles and administrators Preview | | | | | | | | |
| Manifest | | | | × | | | | |
| Support + Troubleshooting | | | | | | | | |
| Troubleshooting | | | | | | | | |
| 8 New support request | | | | | | | | |
| | | | | | | | | |
| | | | | Add permissions Discard | | | | |

Figure 9 Add permissions



• For authentication, a client secret is needed. Fill in a description BeneVoice and set the expiry as Never.

Save the secret key value into a secure place as it is not visible afterwards.

| AND A REAL PROPERTY AND A | lade/Microsoft_AAD_RegisteredApps/ApplicationMenuBlade/Credentials/quickStartType//sourceType/Microsoft_AAD_IAM/appld/33057387-1073-4198-9704-42e09fa/1bad/objec | | | 6400 📵 | 🔅 🍥 🕭 🛒 😁 🗄 |
|---|--|-----|-----|--------|------------------------|
| Z BeneCC CallLists (ak () powershell for | getti 🗞 GET /authuser/luse 👫 Benemen IT Suppor 📕 Read these 📕 Benehaps | | | | × |
| Microsoft Azure | | E 4 | ۵ 🕫 | | patrik.vaskivuori@bene |
| | | | | | |
| P BeneVoice Certific | ates & secrets 🖉 | | | | × |
| | 😳 Got feedback? | | | | |
| Cverview | Add a client secret | | | | |
| 4 Quickstart | | | | | |
| 💋 Integration assistant Preview | | | | | |
| Manage | Expires | | | | |
| Branding | In 1 year In 2 years | | | | |
| Authentication | O Nexer | | | | |
| Y Certificates & secrets | Add Cancel | | | | |
| ta Token configuration | 100 Canada | | | | |
| API permissions | | | | | |
| Expose an API | | | | | |
| Conners | Client secrets | | | | |
| Roles and administrators Preview | A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password. | | | | |
| Manifest | + New client secret | | | | |
| Support + Troubleshooting | Description Expires Value | | | | |
| Troubleshooting | | | | | |
| New support request | No client secrets have been created for this application. | | | | |
| | A sub-sub-sub-sub-sub-sub-sub-sub-sub-sub- | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Figure 10 Add a client secret

| Certificates | | | | | | | |
|---|----------------------------------|-------------------------|----------------------------|--------------------|------------------------|--------|--|
| Certificates can be used as secrets to | prove the application's identit | y when requesting a tok | en. Also can be referred t | o as public keys. | | | |
| 7 Upload certificate | | | | | | | |
| Thumbprint | | Start date | Expires | ID | | | |
| No certificates have been added for t | his application. | | | | | | |
| | | | | | | | |
| Client secrets | | | | | | | |
| A secret string that the application us | ses to prove its identity when r | equesting a token. Also | can be referred to as app | lication password. | | | |
| + New client secret | | - | | | | | |
| Description | Expires | Value | Cop | sied | | | |
| BeneVoice | 1/15/2022 | 9727ceQ6ykdt60 | x.NJnt2c_YWhe_JE38 | fd Bf36-fe6 | b-4bf7-87de-5870d65818 | 90 🗈 📋 | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

Figure 11 Certificates & secrets



Once secret key is created, send the secret key value and application id & directory id (from overview page) to your contact at Benemen. Benemen will need to do a separate deployment on background for the integration to work.

After the Azure App registration is completed, next step is to Install BeneVoice for Dynamics 365 package and set up an application user in Dynamics 365.

1.3 Install BeneVoice for Dynamics 365 package to Dynamics 365 Instance

Install BeneVoice managed package provided by Benemen and login to appropriate Microsoft Dynamics 365 organization with System Administrator credentials.

BeneVoiceForD365Package contains the following:

- The package contains solutions with base entities, configuration data and settings, links for the Azure apps/functions.
- BeneVoice channel provider *Note: for the Channel Integration Framework v1.0 only*
- Omnichannel configuration data (session, notification templates) are to be installed within the solution package automatically. *Note: for the Channel Integration Framework v2.0 only*

1.3.1 The installation process for the customer's administrator

- Incoming zip package should be unpacked
- Right-click on DeploymentPackage.dll and verify that the file is not blocked. If it is, unblock and then apply. Otherwise, might an error message might occur during the
- deployment (no solution found).



| eneral Sec | urity Details Previous Version | |
|---------------|---|-----------------------|
| 0. | DeploymentPackage.dll | |
| Type of file: | Application extension (.dll) | |
| Opens with: | Unknown application | Change |
| Location: | C:\Dev Install\DeploymentPack | kage (5)\DeploymentPa |
| Size: | 13.5 KB (13,824 bytes) | |
| Size on disk: | 16.0 KB (16,384 bytes) | |
| Created: | 01 June 2020, 16:52:34 | |
| Modified: | 11 June 2020, 17:39:38 | |
| Accessed: | 11 June 2020, 17:39:38 | |
| Attributes: | Read-only Hidden | Advanced |
| Security: | This file came from another cor and might be blocked to help p this computer. | |

Figure 12 Deployment Package properties

- Then run PackageDeployer.exe and go through the standard wizard.
- Wizard will guide the user through all the needed steps for installation.



| Mackage Deployer for Microsoft Dynamics CRM | _ | × |
|--|---|---|
| Microsoft Dynamics CRM | | |
| Package Deployer The Package Deployer lets you package one or more CRM solutions, data, files, and custom code operations together into a "package" that can be deployed to any CRM environment. The Package Deployer also supports the upgrade of existing "package" deployments. | | |
| Please read and review the license agreement for this product. Continue | | |
| | | |

Figure 13 Package Deployer Wizard

| 4 Package Deployer for N | licrosoft Dynamics CRM | _ | |
|--------------------------|----------------------------|---|--|
| Connect to Micr | osoft Dynamics CRM | | |
| Deployment Type: | ● On-premises ○ Office 365 | | |
| Server | | | |
| Port | Use SSL | | |
| Authentication Source: | Active Directory ~ | | |
| | Sign in as current user | | |
| User Name | | | |
| Password | | | |
| Domain | | | |
| Display list of avai | lable organizations | | |
| | | | |
| | | | |
| Login | | | |
| | 1 | | |
| | | | |

Figure 14 Insert your company information

 \times



| 📕 Package Deployer | for Microsoft Dynamics CRM | — C |
|--------------------|---------------------------------------|-----|
| Connect to N | Microsoft Dynamics CRM | |
| Deployment Type: | On-premises Office 365 | |
| Sign in as cu | rrent user | |
| ✓ Display list or | f available organizations | |
| Show Advance | ced | |
| Advanced | | |
| Online Region | Europe, Middle East and Africa \sim | |
| User Name | your.email@company.com | |
| Password | ••••• | |
| | | |
| | | |
| | | |

Figure 15 Company information example

Login

| ganization you would like to con | ilable to you. Please choose the CDS nect to. | |
|----------------------------------|--|--|
| CRM Region | Organization Name | |
| Europe, Middle East and Africa | | |
| Europe, Middle East and Africa | Benemen | |
| Europe, Middle East and Africa | Benemen | |
| Europe, Middle East and Africa | Benemen | |
| Europe, Middle East and Africa | org | |
| Europe, Middle East and Africa | org | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

Figure16 Connect to Microsoft Dynamics CRM



Manual BeneVoice Customizations Setup for Microsoft Dynamics CRM



Welcome to the BeneVoice Customizations Setup Tool

BeneVoice Customizations and Settings

| Bene Voice for D365 Package | |
|---|--|
| - Channel Provider will be created - Bene Settings will be updated | |
| Click Next to Continue | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

Figure 17 BeneVoice for D365 Package

| eneVoice Customizations Setup for Microsoft Dynamics CRM | | - | | \rightarrow |
|--|----------|---|------|---------------|
| leady to Install | | | | |
| olution Package : BeneVoice Customizations | | | | |
| rganization : org | | | | |
| | | | | |
| make changes, click Previous. To install the solution package, click Next. | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | Previous | | Next | |

Figure 18 Ready to Install



X

_

| 4 | BeneV | oice Customizations Setup for Microsoft Dynamics CRM | - | | \times |
|---|---------|---|---|------|----------|
| | Read | ling BeneVoice Customizations Installer Configuration | | | |
| | Status: | Ready | | | |
| | Organi | zation : org | | | |
| | View lo | g file | | | |
| | Ø | Import configuration loaded. | | | ^ |
| | Ø | Found 1 solutions. | | | |
| | Ø | Found the solution: Bene Voice Customizations, version: 1.0.3.2 (Managed) | | | |
| | Ø | 2. Dependency Found ChannelAPIIntegrationFramework | | | |
| | 0 | 2. Dependency Found : Dependency on solution msdynce_Sales found on target environment | | | |
| | Ø | 3. Dependency Found : Dependency on solution msdynce_LeadManagement found on target environment | | | |
| | Ø | 4. Dependency Found : Dependency on solution AppModuleWebResources found on target environment | | | |
| | Ø | 5. Dependency Found : Dependency on solution msdynce_AppCommon found on target environment | | | |
| | Ø | 6. Dependency Found : Dependency on solution msdynce_Service found on target environment | | | |
| | 0 | 7. Dependency Found : Dependency on solution msdynce_Customerservicehub found on target environment | | | ~ |
| | | Previous | | Next | |

Figure 19 Installer Configuration

heneVoice Customizations Setup for Microsoft Dynamics CRM

Executing Install Actions

Status: BeneVoice Customizations and Settings Unpacked

| Organ | ization : org | | |
|--------|--|----------|------|
| Ø | Loaded the solution Bene Voice Customizations, version: 1.0.3.2. | | |
| ø | Pre-import process complete. | | |
| ø | Post-import process complete. | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| View k | g file | | |
| | | Previous | Next |

Figure 20 Executing Install Actions



- 🗆 🗙

MageneVoice Customizations Setup for Microsoft Dynamics CRM

Installation Complete

| Bene Voice for D365 Package | ^ |
|-----------------------------|--------|
| Import completed | |
| | |
| | |
| | |
| | |
| | |
| | ~ |
| | Finish |

Figure 21 Installation Complete

PLEASE NOTE: All future updates after the first installation are also done with the Package Deployer / Wizard!

1.4 Configure application user in D365

Please complete Azure App registration before proceeding to configuring the application user in Dynamics 365.

- Navigate to Dynamics 365 Settings and User management.
- **PLEASE NOTE:** Change the list view to Application users and choose: **New (upper left in the ribbon)**



| → C | xx?settingsonly=true#402733200 | |
|---|---|--------------------|
| 🗰 🍙 🗸 Settings 🗸 se | curity | ୦ ଏ |
| JEW 🐣 🛧 PROMOTE TO ADMIN 🖙 EMAIL A LINK 🗌 👻 | ø/ ^a flow 👻 🧑 and the port 👻 📓 excel templates 👻 🏨 export to excel 💷 👼 import data | · · · · · |
| ↔ Application Users ✓ | | Search for records |
| □ Full Name ↑ | Application I Azure AD Obj Application I | |
| Business Application Platform Service account | 475226c6-02 1df4108e-4f4 https://servic | |
| Microsoft Forms Pro | 19dd5b37-d1 2ac20c21-e1 19dd5b37-d1 | |
| Power Apps Checker Application | c9299480-c1 cec46591-78 https://test.a | |
| RI AppUser | dc431514-d1 e661af1b-789 https://crmri | |
| Super Cards | e61d067b-25 c19a0717-70 e61d067b-25 | |
| VOC Push Service | 19c49fe8-933 6aca5b3c-a9 https://crms2 | |
| | | |

Figure 22 Application users

• When a new user form appears, change first the form to USER: APPLICATION USER to be able to enter the application user details. Add the same application id to the Application ID field that was created in Azure App registration. Fill in fields in User information section and click save.



| | | Û | ~ | Settings 🗸 | Security | Ne |
|----|--------|---------------|----------------------|-----------------------------|-----------------|-------|
| 54 | VE | 🛱 SAVE & CL | .OSE p/ ^a | FLOW ≁ ₀∕ ^a FLOW | - EFOR | M EC |
| | 0 | | applicat User | TION USER ▼ | | |
| | | | ovided in th | is form is viewable by th | ne entire orgar | izati |
| ĺ | | mmary | | | | |
| | Acco | ount Informa | ation | | | |
| | User | Name * | ł | benevoice@beneme | n.com | |
| | Appl | lication ID * | 3 | 3 | | |
| | Appl | lication ID U | RI 🔒 - | | | |
| | Azur | e AD Object | ID 🌯 🔒 - | | | |
| | User | Informatio | n | | | |
| | Full 1 | Name * | E | Bene Voice | | |
| | Prim | ary Email * | 1 | benevoice@beneme | n.com | |
| | | | | | | |

Figure 23 New application user

• If application user setup is done correctly, values should appear to Application ID URI and Azure AD Object ID fields.





| III 🟠 · | ~ Settings | ∽ Security | Bene Voice | > |
|--|-------------------------|---------------------|-------------|---------|
| CONNECT - 🗑 DELETE | PROCESS - | R APPROVE EM | AIL 🔤 REJEC | T EMAIL |
| Bene Voi | | | | |
| The information provided in A Summary | n this form is viewable | by the entire organ | nization. | |
| Account Information | | | | |
| User Name * | benevoice@ben | emen.com | | |
| Application ID • | 3 | | | |
| Application ID URI | 33 | | | |
| Azure AD Object ID * | dc2 | | | |
| User Information | | | | |
| Full Name * | Bene Voice | | | |
| Primary Email * | benevoice@ben | emen.com | | |
| | | | | |

Figure 24 Application user saved

• Finally, give the application user a security role **BeneVoice ApiUser**.



×

Manage User Roles

What roles would you like to apply to the 1 User you have selected?

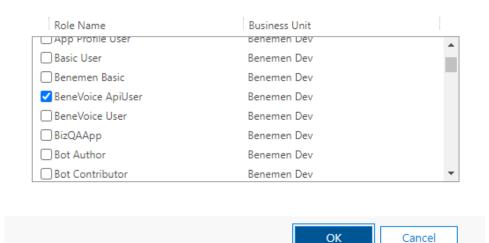


Figure 25 Add a security role

1.5 BeneVoice Configuration

Configuration settings are divided on the following parts

1.5.1 Channel Provider Configuration

1.5.1.1 Configuration for Channel Integration Framework 1.0

Open Dynamics and open Channel Integration Framework App:



| ops | | | | | 62 |
|---|--|--|---|---|----------------------|
| Search my apps | | | | + Create new App | 🖔 Refresh 🛛 🖓 Filter |
| • Published Apps (25) | | | | | |
| | 7 | | | | |
| Dynamics 365 —Benemen Provides access to the full suite of capabilities, including administration | 2nd Line Support | Benemen Sales | BeneVoice Configurator BeneVoice configuration settings | Billing | |
| Microsoft Dynamics 365 12.11.2020 WEB | Default Publisher for benemen 9.4.2019 UNIFIED INTERFACE | Default Publisher for benemen 25.10.2019 UNIFIED INTERFACE | Benemen UNIFIED INTERFACE | Default Publisher for benemen 14.6.2019 UNIFIED INTERFACE | |
| \$ ⁰ | V | V | | benemen | |
| Channel Integration Fra Bring your communication channels and build immersive experience with | Customer Service Hub A focused, interactive experience for managing your customer service. | Customer Service worksp Multi-session Customer Service with Productivity tools | Deployment | Dynamics 365 App for O Provides access to Dynamics 365 App for Outlook for enabled users. | |
| Microsoft Dynamics 365 | Default Publisher for benemen 19.1.2019 UNIFIED INTERFACE | Microsoft Dynamics 365 | Default Publisher for benemen 17.2.2019 UNIFIED INTERFACE | App for Outdook for enabled users. Default Publisher for benemen 27.8.2018 UNIFIED INTERFACE | |
| | | A | • | D, | |

Figure 26 Channel Integration Framework App

• This configuration is used for customers that are not using the Omnichannel capabilities and do not use Omnichannel licensing in their Dynamics 365 environment.



| 🗰 🍙 Chann | nel Integration Framework | | > ∅ ♀ + ∀ |
|--|----------------------------|--|-------------------------------------|
| = | | Refresh 🛛 Email a Link 🛛 🗸 🎾 Flow 🗸 🗐 Run Report 🗸 | 🕮 Excel Templates \vee 🛛 🕼 Export t |
| 企 Home | Active Channel Providers ~ | | 𝕎 Quick fi |
| Secent ∨ Pinned ∨ | ✓ Name↑ ✓ | Channel Order \checkmark Label \checkmark | Created On \vee |
| Channel Provider Configuration | benevoice | 1 Bene Voice | 12.11.2020 13.37 |
| Channel Providers | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Figure 27 Active Channel Providers

| Channel | I Integration Framework | ר © Ω + ∇ © ? |
|---------------|---|--|
| | ← 🗟 Save 🖓 Save & Close + New 🗋 Deactivate | 📋 Delete 🖒 Refresh 🖾 Email a Link 🏼 Flow 🗸 🖷 Word Templates 🌾 💷 Run Report 🗸 |
| ent V | benevoice Channel Provider | |
| ed 🗸 🗸 | Channel Provider Configuration | |
| Provider | Name benevoice | Select Unified Interface Apps for the Channel Select the Roles for the Channel |
| nel Providers | Label * Bene Voice | Benemen Sales x Enter text here V Enter text here V |
| | Channel URL * https://app-ben-webp 🕀 | |
| | Enable Outbound * Communication Yes | |
| | Channel Order 1 | |
| | API Version 1.0 | |
| | Trusted Domain https://app-ben-webp 🕀 | |
| | Custom Parameters | |
| | | |

Figure 28 BeneVoice Channel Provider Configuration

Channel integration configuration record with settings is to be created with deployment package during the installation but needs to fill in access-based settings:

• Selest which Apps and User Roles will have access to the channel provider.



• See more about Channel Integration Framework configuration:

https://docs.microsoft.com/en-us/dynamics365/customer-service/channel-integrationframework/configure-channel-provider-channel-integration-framework

1.5.1.2 Configuration for Channel Integration Framework 2.0

• Configuration of BeneVoice Channel Provider

To create channel provider for omnichannel follow the guide <u>https://docs.microsoft.com/en-us/dynamics365/customer-service/channel-integration-framework/v2/configure-channel-provider-app-profile-manager</u>.

Fill in the values for the channel provider as it is shown below. Channel URL and Trusted domain attributes will be provided by Benemen deployment team.



benevoice

Channel Provider

General Related

| Name | * | benevoice |
|-------------------|---|--|
| C Unique Name | * | ben_voicechannel |
| Label | * | BeneVoice |
| Channel URL | * | <to be="" benemen="" by="" deployment="" provided="" team=""></to> |
| Enable Out Bound | * | Yes |
| Channel Order | * | 1 |
| Api Version | * | 2 |
| Trusted Domain | | <to be="" benemen="" by="" deployment="" provided="" team=""></to> |
| Custom Parameters | | |
| Enable Analytics | | No |

Figure 4 Channel provider configuration

1.5.2 Users

1.5.2.1 Update BeneCloud User ID

Open BeneVoice Configurator App



| ps | | | | | E × |
|--|--|---|--|---|---------------|
| F- | | | | | |
| O Search my apps | | | | + Create new App 🛛 Ref | resh 🍸 Filter |
| Published Apps (25) | | | | | |
| Þ | 7 | | | e | |
| Dynamics 365 —Benemen Provides access to the full suite of | 2nd Line Support | Benemen Sales | BeneVoice Configurator BeneVoice configuration settings | Billing | |
| capabilities, including administration | | | | | |
| Microsoft Dynamics 365 12.11.2020 | Default Publisher for benemen 9.4.2019 | Default Publisher for benemen 12.11.2020 | Benemen | Default Publisher for benemen 14.6.2019 | |
| WEB | UNIFIED INTERFACE | UNIFIED INTERFACE | UNIFIED INTERFACE | UNIFIED INTERFACE | |
| ¢۵ | V | V | | benemen | |
| Channel Integration Fra | Customer Service Hub | Customer Service worksp | Deployment | Dynamics 365 App for O | |
| Bring your communication channels and build immersive experience with | A focused, interactive experience for managing your customer service. | Multi-session Customer Service with Productivity tools | | Provides access to Dynamics 365 App for Outlook for enabled users. | |
| Microsoft Dynamics 365 | Default Publisher for benemen 19.1.2019 | Microsoft Dynamics 365 | Default Publisher for benemen 17.2.2019 | Default Publisher for benemen 27.8.2018 | |
| UNIFIED INTERFACE | UNIFIED INTERFACE | UNIFIED INTERFACE | UNIFIED INTERFACE | UNIFIED INTERFACE | |

Figure 29 BeneVoice Configurator App

• Navigate to Users Settings and choose Update Bene User Ids –button (on top of the page)

| III 💼 🔒 Ber | neVoi | ce Configurator | | | | | ۍ م | v + v ⊜ ? | • @ |
|---------------------|-------|-----------------|-----------------|------------------------|----------------------|-------------------|----------------------------|--------------------|-----|
| - | | ← 😨 Show Chart | ③ Update Bene U | iser ids 🖒 Refresh 🛛 🕻 | 🐯 Email a Link 🛛 🗸 🔤 | ≫ Row ∨ S Row ∨ (| 🖻 Run Report \vee 🛛 🛍 Exc | el Templates 👻 🗄 | |
| | _ | Bene Users ~ | | | | | | V Quick find | ,p |
| | - | ✓ Full Name ↑ | ~ | Business Unit 🗸 | Title 🗸 | Main Phone 🗸 | Benemen User Id \backsim | Only Queue Calls 🗸 | |
| | | | | benemen | | | | No | |
| Configuration | | | | benemen | | | | | |
| General Settings | | | | benemen | | | | No | |
| R Users Settings | | | | benemen | | | | No | |
| Callbacks | | | | benemen | | | | No | |
| Callback Profiles | | | | benemen | | | | No | |
| Bene Callback Lists | | | | benemen | | | | No | |
| D Queues | | | | benemen | | | | No | |
| Smart Routing | | | | benemen | | | | No | |
| Bene Queues | | | | benemen | | | | No | |
| Channels | | | | benemen | | | | No | |
| Channel Providers | | | | benemen | | | | No | |
| A change monders | | | | benemen | | | | No | |
| | | | | benemen | | | | No | |
| | | | | benemen | | | | No | |
| | | | | | | | | A.L. | |
| | | <u>Al</u> # A | 8 C D | E F G P | ст л к | L M N O P | Q R S T | | c z |

Figure 30 Update Bene User Ids



• Wait couple of seconds and Benemen User Ids should appear on the user list for the users that have same email address than in BeneCloud.

| Bene Users \vee | | | | | 𝕎 Quick find |
|-------------------|----------------------------|--------------------|-------------------------|------------------------------|-------------------------|
| ✓ Full Name ↑ ✓ | Business Unit \checkmark | Title \checkmark | Main Phone \checkmark | Benemen User Id \checkmark | Only Queue Calls \sim |
| | benemen | | | 5df659c3-7f29-e911 | |
| | benemen | | +358407647799 | 4107f72e-0539-e911 | |
| | benemen | | | | |
| | benemen | | | 59e4b749-23bb-e81 | |
| | benemen | | | | |
| | benemen | Product Manager | +358 40 515 8322 | | No |
| | benemen | Board member | +358293701273 | 5925eb69-3f53-e211 | |
| 2 | benemen | | | 07445c45-5d56-e211. | |
| | benemen | | | b9297cca-4b17-ea11. | . No |
| | benemen | | | | |
| | benemen | | | | |
| | benemen | | | b23779a4-6c02-e711. | |
| | benemen | | | 60f65e35-162c-e811 | |
| | benemen | | | | |
| | benemen | | | | |
| | ac henemen | | | aarcah?d_5d7c_aQ11 | |
| 4 | E F G H | I J K L | M N O P | Q R S T | U V W X |

Figure 31 Benemen User Id

• After updating the ids, if some user is missing the Benemen User id, then you need to manually update the correct BeneCloud User id to *Benemen User Email* field on the user record:



| | | BeneV | oice Configi | urator | | | | | | | م |
|-----------|-------------------|--------|--------------|----------------|----------------|-------|-----------------------------|----------|-----------|--------------------|-----------------|
| = | | | ← 🗉 | 🗟 Save | 🛱 Save & Close | + New | ⁸ ਨੇ Connect │ ∽ | 🗐 Delete | 🖔 Refresh | 🗟 Reassign Records | →← Join Teams { |
| 60 (-) | | \sim | DA | Dynamics | Administrato | or | | | | | |
| Ś | Pinned | \sim | Bene V | /oice Settings | Related | | | | | | |
| Co | nfiguration | | Be | enemen User Id | | | | | | | |
| 公 | General Settings | | Be | enemen User En | nail | | | | | | |
| 8 | Users Settings | | | | | | | | | | |
| Cal | llbacks | | | | | | | | | | |
| 쑶 | Callback Profiles | | | | | | | | | | |
| 쑶 | Bene Callback Li | sts | | | | | | | | | |
| Ð | Queues | | | | | | | | | | |
| Sm | art Routing | | | | | | | | | | |
| 쏬 | Bene Queues | | | | | | | | | | |
| Ch | annels | | | | | | | | | | |
| × | Channel Provide | rs | | | | | | | | | |
| | | | | | | | | | | | |

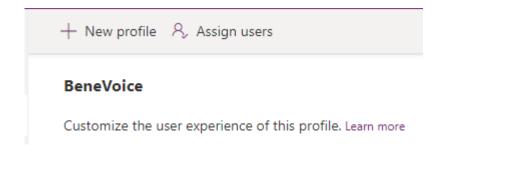
Figure 32 User record BeneVoice settings

- **Bene User Id** unique identifier of the user in BeneCloud
- Bene User Email (optional) should be filled in if email user in D365 differ from BeneCloud

1.5.2.2 Assign users to Application Profile (CIF 2.0)

After creating the *Application Profile* and *Channel Provider* in *PowerApps Portal* according to Microsoft's instructions (see chapter 1.5.1.2 Configuration for Channel Integration Framework 2.0), users who will be authorized to use the phone widget need to be assigned to the newly created Application Profile.

To do this, click Assign Users on the top menu on Application Profile editor.





A view will open in Dynamics Unified Interface. Click *Add Existing User* and select the user(s) to be added.

BeneVoice

App profile $\,\cdot\,$ Users $\,\vee\,$

| General Related | | |
|--|-------------------|---|
| | | |
| Users | | 🖄 Add Existing User 🗄 |
| \checkmark Full Name \uparrow \checkmark | Site \checkmark | Business Unit \checkmark Title \checkmark |
| Dev One | | benepoctt |

1.5.3 Phonecall sync settings

• Phone Call Synchronization settings are in General Settings -> Phone Call sync settings view:



| III n BeneV | ice Configurator | م | | | | |
|---|---|--|--|--|--|--|
| = | \leftarrow 🖾 Show Chart $+$ New 🛍 Delete $ $ \checkmark \bigcirc Refresh \Box Email a Link $ $ \checkmark | - 🔊 Flow 💛 🔟 Run Report 🗡 幅 Excel Templa | | | | |
| ☆ Home③ Recent ∨ | Phone Call Sync Settings \sim | | | | | |
| 🖈 Pinned 🗸 🗸 | ✓ Name ↑ ∨ CallStartMargin | Value ~ | | | | |
| Configuration | DefaultCrmAssignee | | | | | |
| General Settings | EnableAudit | True | | | | |
| | EnableMultipleMatchCreate | True | | | | |
| Callbacks | ExecutionInterval | 120 Incoming direct call | | | | |
| Bene Callback Lists | IncomingQueueCallSubject | Incoming queue call | | | | |
| 🖺 Queues | MultipleMatchPhoneCallStatus | | | | | |
| Smart Routing | NumbersToCut | 3 | | | | |
| 쯌 Bene Queues | OutgoingDirectCallSubject | Outgoing direct call | | | | |
| Channels | ProcessDirectCalls | False | | | | |
| X Channel Providers | ProcessServiceCalls ProcessServiceCallsUnanswered | True | | | | |
| | RunInDebugMode | False | | | | |

Figure 33 Phonecall Sync Settings

| | 💼 🛛 Bene | Voice Co | onfigura | itor | | | | | | | | |
|-----|---------------------|----------|----------|----------|----------------|-----------------|--------------------|------------------|----------------|-----------------|---------|---------|
| = | | ÷ | Ē | 🖬 Save | 🚰 Save & Close | + New | 🕞 Deactivate | 🗊 Delete | 🕐 Refresh | R, Assign | 🔄 Share | 🖾 Email |
| ଜ | Home | D | efault | tCrmAssi | gnee | | | | | | | |
| ٩ | Recent \checkmark | Be | ne Setti | ing | | | | | | | | |
| \$ | Pinned \checkmark | Ge | eneral | Related | | | | | | | | |
| Cor | figuration | | Nam | ie. | * Default | CrmAssignee | | | | | | |
| ⇔ | General Settings | | Grou | up Name | PhoneC | allSync | | | | | | |
| 8 | Users Settings | | Valu | e | c7d904 | 79. | | | | | | |
| Cal | lbacks | | Long | g Value | | | | | | | | |
| ⇔ | Callback Profiles | | | | | | | | | | | |
| ⇔ | Bene Callback Lists | | Desc | ription | bene us | er id, which is | set as owner of pl | hone call, in ca | se bene user w | as not found in | n D365 | |
| n | Queues | | | | | | | | | | | |
| Sm | art Routing | | Own | ier | * • A • | mamics Adm | inistrator | | | | | |
| ⇔ | Bene Queues | | | | | | | | | | | |
| Cha | innels | | | | | | | | | | | |
| × | Channel Providers | | | | | | | | | | | |

Figure 34 DefaultCRMAssignee

01.06.2021



- **CallStartMargin** value in seconds, used to set a range of searching existing phone calls, to avoid creating duplicates.
- **DefaultCrmAssignee** bene user id, which is set as the owner of a phone call, in case user bene user was not found in D365. Current value e.g. fbc423f5-74f9-e911-80e0-... The value can be any Bene user id chosen by the customer organization.
- **EnableAudit** boolean value, which defines to set in BenemenApiAudit field of a phone call in D365. In case it is false, the field will be set as CallId is {benemen call id}, in other cases, all the values retrieved from the Benemen regarding this phone call will be set.
- **EnableMultipleMatchCreate** boolean value, which defines if service calls should be created when multiple contacts/accounts/leads found.
- **ExecutionInterval** value in minutes, which is taken from execution start and set into start date for phone calls retrieval from Bene API.
- **IncomingDirectCallSubject** string value, defines the subject of a direct phone call.
- **IncomingQueueCallSubject** string value, defines the subject for service phone calls.
- **MultipleMatchPhoneCallStatus** int value, which should exist as status reason value of phone call in D365. Set when multiple contacts/leads/accounts found and EnableMultipleMatchCreate is true.
- **NumbersToCut** int value, defines the number of characters to be cut off from the start of the phone number, before searching in D365.
- **OutgoingDirectCallSubject** string value, subject for outgoing phone calls.
- **ProcessDirectCalls** boolean value, defines whether direct answered calls should be retrieved and processed.
- **ProcessServiceCalls** boolean value, defines weather service answered calls should be retrieved and processed.
- **ProcessServiceCallsUnanswered** boolean value, defines weather service unanswered calls should be retrieved and processed.
- **RunInDebugMode** boolean value. When set true, the start date of phone calls retrieved from bene API is execution date 45 days and the end date is now.

1.5.4 Callbacks

Callbacks can be configured only after you get a confirmation from Benemen.



Callbacks are Console application to run synchronization of callbacks from bene API into Dynamics 365. Application retrieves callback requests from Bene API, transforms data into corresponding D365 format, maps to D365 contact/account/lead, and creates corresponding phone call records in D365.

Callback functionality can be configured for organizations that receive callback requests e.g. for Sales or Customer Service purposes to reconnect with the customer at a more suitable time.

In order to configure callbacks in Dynamics 365 at least one callback profile needs to be added with the following (example) settings:

| | Ber | neVoice | Configurator |
|------|---------------------|---------|--|
| = | | ÷ | – 🔚 Save 📓 Save & Close 🕂 New 🔊 Flow 🗸 |
| ŵ | Home | | New Bene Callback Profiles |
| Ŀ | Recent 🔨 | ~ | General |
| Ś | Pinned N | ~ | |
| 6 | <i>C</i> | | Name * Support |
| | figuration | | Callback List 🔀 Support |
| 쑶 | General Settings | | |
| 8 | Users Settings | | Queue 🕒 Support |
| Call | backs | | Age Time Unit Hours |
| 쑶 | Callback Profiles | | Callback Age 1 |
| 쑶 | Bene Callback Lists | | |
| Ē | Queues | | Owner * O A Dynamics Administrator |
| Sma | art Routing | | |
| | | | |
| 公 | Bene Queues | | |
| Cha | nnels | | |
| × | Channel Providers | | |

Figure 35 Callback Profile Example Settings



- Callback List: lookup to a virtual entity, which is retrieved from Bene API.
- **Queue**: lookup to OOB D365 entity Queue. Defines to which queue callbacks should be assigned to.
- Age Time Unit: a unit of the time-period, can be Days, Hours, Minutes
- Callback Age: number value of defined periods in the previous field.

All active callback profiles will be proceeded during execution of the callback synchronization job.

1.5.5 Dynamics 365 apply Phone call form

BeneVoice – Phone Call form should be chosen as the main form for the Phone Call entity. Please consider if your organization has done customizations to the phone call forms.

- Navigate to customize the Unified Interface App (one or many) that your organization uses in your Dynamics 365 environment.
- Open in App Designer (click the three dots on the rightside corner of the App)

| | Support | × |
|--|-----------------------------------|----------|
| Support | OPEN IN APP DESIGNER | y / C |
| Default Publisher for benemen 11/19/2020 UNIFIED INTERFACE | Dynamics 365 UNIFIED INTERFACE | Zap Obje |

Figure 36 Open in App Designer

- Add Phone Call entity to the list of entities, if it is not already included
- Change the Main form to BeneVoice Phone Call



• Include Quick View and Quick Create Forms to the app solution.

| App Designer - Google Chrome | - 🗆 X |
|---|---|
| benemen.crm4.dynamics.com/designer/app/9FA5955C-533D-E811-A954-000D3A206976/1218A354-3F1D-E911- | -A9AC-000D3A2065C5#/AppDesignerCanvas/1218a354-3f1d-e911-a9ac |
| Power Apps | |
| App Designer Support | Last Saved on:17.11.2020 10.49 *Draft |
| + 2 iii Add Edit Remove | , O ? Search Canvas Help |
| | Components Properties |
| | Select Forms Create New |
| ▼ Entity View (4) | Phone Call 🗸 |
| Account 🔲 Forms 1 🗸 🎟 Views All 🚮 Charts | All Ø Das |
| | ✓ Main Forms |
| Case Forms 1 Views 11 Views Charts | All O Das |
| Case Forms 1 Views 11 Views 11 Charts | All O Das Information A form for this entity. |
| | Phone Call Updated Default Phon |
| Contact 🗏 Forms 3 🗸 🖽 Views All 📣 Charts | All 🕜 Das 🛛 Phone Call for Interac |
| | Default Interactive exp Quick View Forms |
| Phone Call 📕 Forms 4 🗸 🔠 Views All 🖬 Charts | All O Das Phone Call Reference |
| | A form that displays R Quick Form |
| | This is the form that is |
| | Quick Create Forms |
| | Phone call quick creat Phone call quick creat |
| | , |

Figure 37 Change the forms to BeneVoice - Phone Call

• Save and Publish



1.5.6 Dynamics 365 Click-to-Dial configuration

Click-to-Dial gives the possibility to make a phone call directly by clicking a button in Dynamics 365 Phone number /mobile number field.

Customize the forms where you want to enable the Click2Dial functionality for the phone number fields:

- Go to form customizations, then target form
- Select the field properties for the field.
- Choose Controls tab and add a new control, choose Channel Communication Control.
- Select the radio buttons to Channel Communication Control

| 🐱 Form: Contact - Google Chrome | | | | | - 🗆 X |
|---|---|------------------------------------|---------------------|----------------|--|
| benemen.crm4.dynamics.com/ma | in.aspx?pagetype=formeditor&app | SolutionId=%7b9FA595 | 5C-533D-E81 | 1-A954-000D3A2 | |
| FILE HOME INSERT | Field Properties Modify this field's properties. | | | ? X | |
| Save As Save and Close Publish Save | Display Formatting Details Ev | rents Business Rules C Web Phor | ontrols e Tablet | | |
| Form headers now default to high der | Text Box (default) | 0 0 | 0 | | |
| Benemen Contact | Channel Communication Control | | ۲ | × | Field Explorer > |
| Common A Common Playbooks | Add Control | | | | Filter All Fields Only show unused fields |
| Activities Entitlements Social Profiles Documents Addit History Feedback Data Imports Opportunities Comportunities Response Outcomes Survey Activities Leads Leads | Select or add a cu | stom control to see its o | onfiguration. | | Access Failed Count Address 1: Address Type Address 1: City Address 1: Country/Region Address 1: Country Address 1: Freight Terms Address 1: Freight Terms Address 1: Latitude Address 1: Longitude Address 1: Name Address 1: Pone Address 1: Post Office Box Address 1: Primary Contact Name Address 1: Shipping Method |
| Contact O External Identities Cases Zan HD Configurati | | | OK Activity | Cancel | Address 1: State/Province Address 1: Street 1 New Field |

Figure 38 Channel Communication Control



• Do the same steps for all the phone fields you want to enable.

1.6. Test the functionality

If everything was set up correctly, you should see incoming calls open the BeneVoice sidebar in the configured applications.

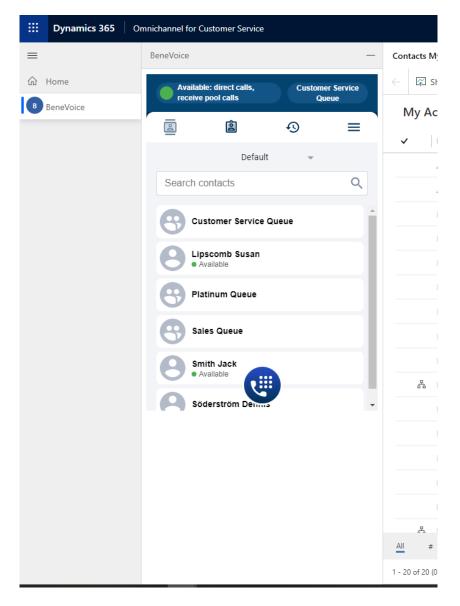


Figure 39 BeneVoice for Dynamics 365, Omnichannel (On the left side of Dynamics 365 UI)



| | ଜ ଜ | ۹ + ۵ | 7 🕸 | ? (D#) | | | | |
|-------|---|---------------------------|-----|--------------------|--|--|--|--|
| | BeneVoice | | | > | | | | |
| A | Available: receive po | direct calls, ol calls | | er Service Jeue | | | | |
| : | 9 | ê | Ð | ≡ ` | | | | |
| | | Default | | | | | | |
| | Search con | tacts | | Q | | | | |
| | Customer Service Queue | | | | | | | |
| | Lipscomb Susan • Available Platinum Queue | | | | | | | |
| | | | | | | | | |
| | Sales | Queue | | | | | | |
| | Smith • Avail | Jack able | | | | | | |
| | Söder | rström Denna | | - | | | | |
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Figure 40 BeneVoice for Dynamics 365 without Omnichannel (on the right side of Dynamics 365 UI)