



BeneVoice for Dynamics 365 Configuration guide



# BeneVoice for Dynamics 365 Configuration Guide



### Contents

Microsoft Dynamics 365 tenant level configuration3
1.1 Installation Prerequisites3
1.1.1 Setting up the Channel Integration Framework without Omnichannel (CIF 1.0)3
1.1.2 Setting up the Channel Integration Framework for Omnichannel use (CIF 2.0)6
1.2 Configure Azure app registration6
1.3 Install BeneVoice for Dynamics 365 package to Dynamics 365 Instance11
1.3.1 The installation process for the customer's administrator11
1.4 Configure application user in D36517
1.5 BeneVoice Configuration21
1.5.1 Channel Provider Configuration21
1.5.1.1 Configuration for Channel Integration Framework 1.0
1.5.1.2 Configuration for Channel Integration Framework 2.0
1.5.2 Users
1.5.2.1 Update BeneCloud User ID25
1.5.2.2 Assign users to Application Profile (CIF 2.0)28
1.5.3 Phonecall sync settings29
1.5.4 Callbacks
1.5.5 Dynamics 365 apply Phone call form33
1.5.6 Dynamics 365 Click-to-Dial configuration35
1.6. Test the functionality



## **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		

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Settings	<b>Ö</b>												
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<b>.</b>	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		
<b>N</b>	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

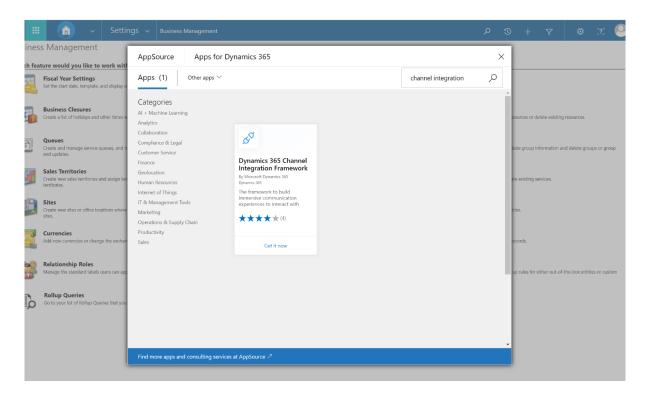
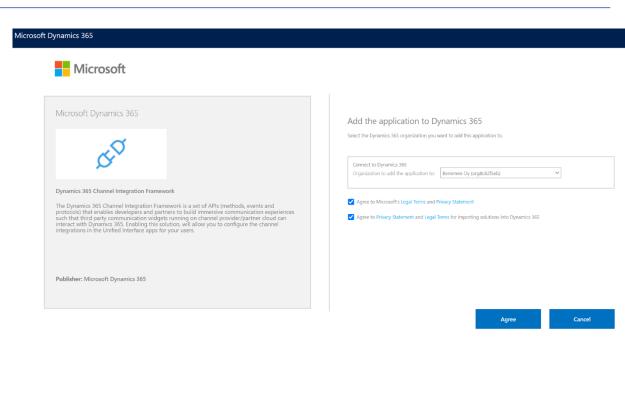


Figure 1 AppSource Dynamics 365 Channel Integration Framework



Office 36



#### Figure 2 Agree to Terms

i <b>crosoft</b>   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 <b>F</b> 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.

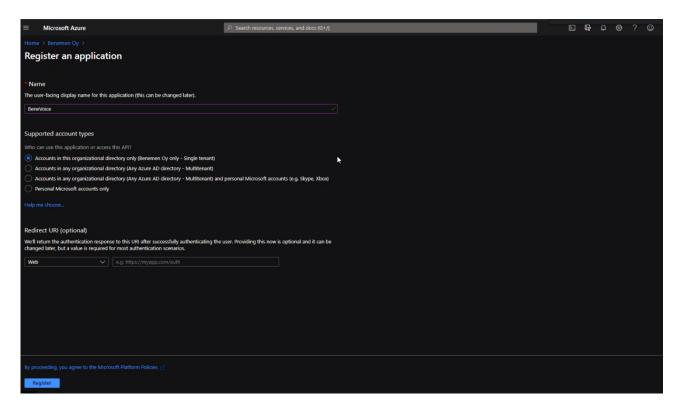


Figure 6 Register an application



- 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:	<b>►</b>	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				
<ul> <li>Overview</li> <li>Quickstart</li> <li>Integration assistant   Preview</li> </ul>		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				
<ul> <li>API permissions</li> </ul>					
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.				
	<ul> <li>A sub-sub-sub-sub-sub-sub-sub-sub-sub-sub-</li></ul>				

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		
<b>Package Deployer</b> 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/ <sup>a</sup> 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/ <sup>a</sup>	FLOW ≁ ₀∕ <sup>a</sup> 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?

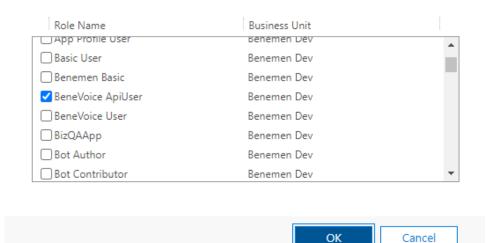


Figure 25 Add a security role

#### **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	
\$ <sup>0</sup>	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	
		<b>A</b>	•	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
<ul> <li>Secent ∨</li> <li>Pinned ∨</li> </ul>	✓ 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	<b>benevoice</b> Channel Provider	
ed 🗸 🗸	Channel Provider Configuration	
Provider	Name <b>benevoice</b>	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 <b>Yes</b>	
	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



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F-					
O Search my apps				+ Create new App 🛛 Ref	resh 🍸 Filter
Published Apps (25)					
Þ	7			<b>e</b>	
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	
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¢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	<sup>8</sup> ਨੇ Connect │ ∽	🗐 Delete	🖔 Refresh	🗟 Reassign Records	→← Join Teams {
60 (-)		$\sim$	DA	Dynamics	Administrato	or					
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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									

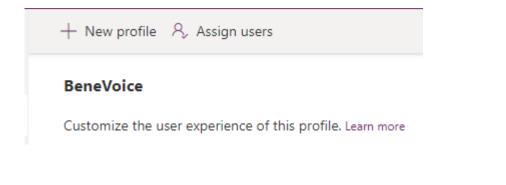
Figure 32 User record BeneVoice settings

- **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				
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<ul><li>☆ Home</li><li>③ Recent ∨</li></ul>	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.		<ul> <li>Access Failed Count</li> <li>Address 1: Address Type</li> <li>Address 1: City</li> <li>Address 1: Country/Region</li> <li>Address 1: Country</li> <li>Address 1: Freight Terms</li> <li>Address 1: Freight Terms</li> <li>Address 1: Latitude</li> <li>Address 1: Longitude</li> <li>Address 1: Name</li> <li>Address 1: Pone</li> <li>Address 1: Post Office Box</li> <li>Address 1: Primary Contact Name</li> <li>Address 1: Shipping Method</li> </ul>
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.

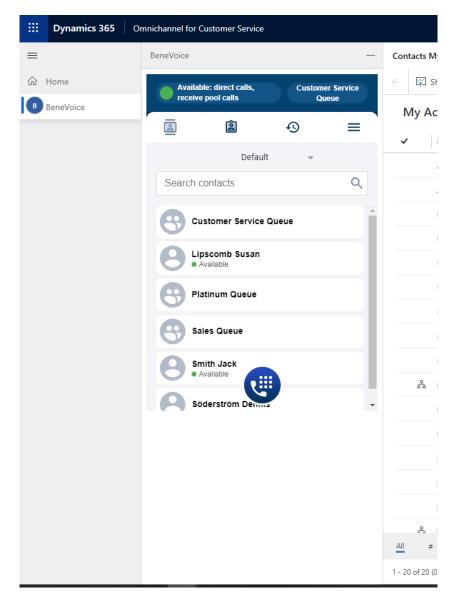


Figure 39 BeneVoice for Dynamics 365, Omnichannel (On the left side of Dynamics 365 UI)



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	BeneVoice			>				
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		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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18,00								

Figure 40 BeneVoice for Dynamics 365 without Omnichannel (on the right side of Dynamics 365 UI)