BeneVoice for Dynamics 365
Configuration Guide

Contents

1 Microsoft Dynamics 365 tenant level configuration

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

BeneVoice for D365 is suitable for three different scenarios from the viewpoint of how Dynamics is configured, what capabilities of Dynamics 365 the customer wants to use.

These are:

- Used in a classic model driven app (CIF1)
- Used in a multisession app (CIF2)
- Used in a multisession app with Omnichannel (CIF2)

The way how Dynamics must be configured and what components need to be installed or provisioned are different.

The following table visualizes the steps that need to be carried out.

	CIF1	CIF2	CIF2 + Omnichannel
Configure Azure App Registration	X	X	X
Provision Omnichannel			X
Install Channel Integration Framework from AppSource	X	X	
Install BeneVoice for D365 package	X	X	X
Configure Application User in D365	X	X	X
Configure Channel Provider in App Profile Manager		X	X
Assign users to Application Profile		X	X
Update BeneCloud User ID	X	X	X
Click-to-Dial configuration	X	X	X

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 single-session Customer service Apps (CIF 1.0) or multi-session e.g. Omnichannel for Customer Service and Customer Service Workspace App use (CIF 2.0).
  https://dynamics.microsoft.com/en-us/pricing/customer-service/#plans
- Install Channel Integration Framework in your target environment, or
- Provision Omnichannel

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

1.1.1 Setting up Channel Integration Framework

- This setup is used for customers who are using
  - o a single-session Dynamics 365 model-driven apps, such as:

    Dynamics 365 Customer Service

    Dynamics 365 Sales

    Dynamics 365 Project Service

    Dynamics 365 Field Service, **or**
  - o have Dynamics 365 Enterprise license and want to use *Customer Service Workspace* multi-session app **without Omnichannel capabilities**

Install Channel Integration Framework in your target environment. The following documentation from Microsoft describes the steps which need to be carried out, in addition a few screenshots help to guide the installation.

https://docs.microsoft.com/en-us/dynamics365/customer-service/channel-integration-framework/get-channel-integration-framework
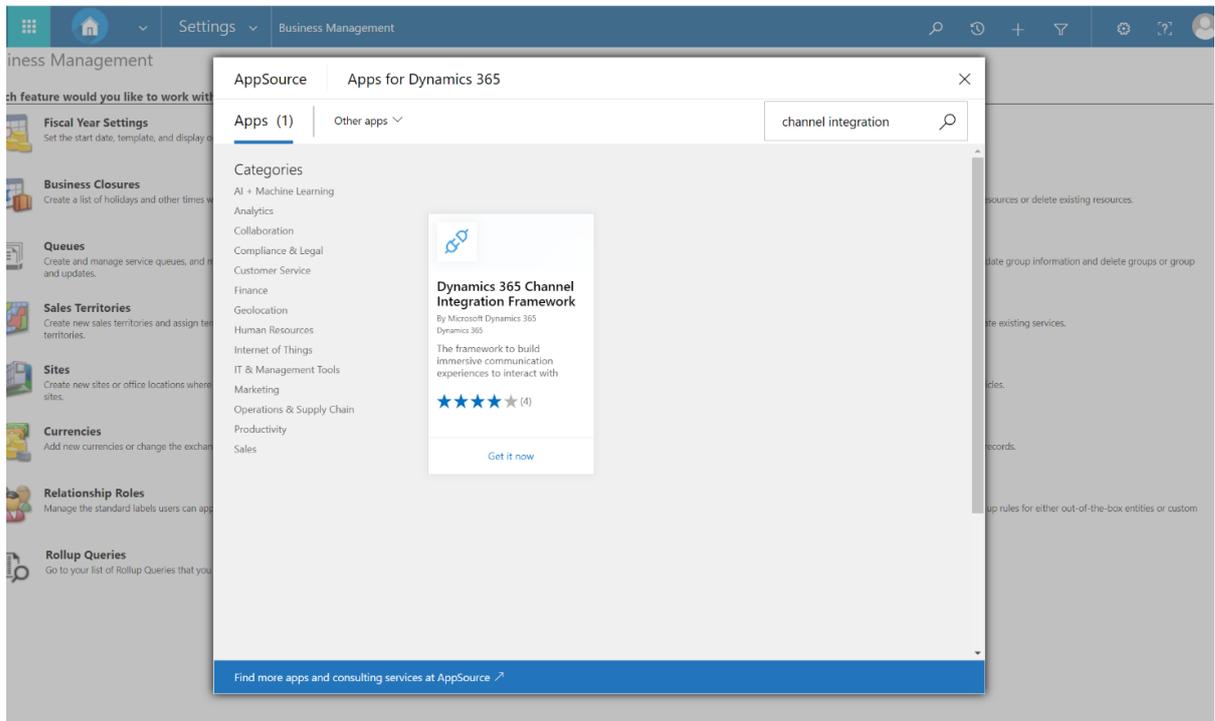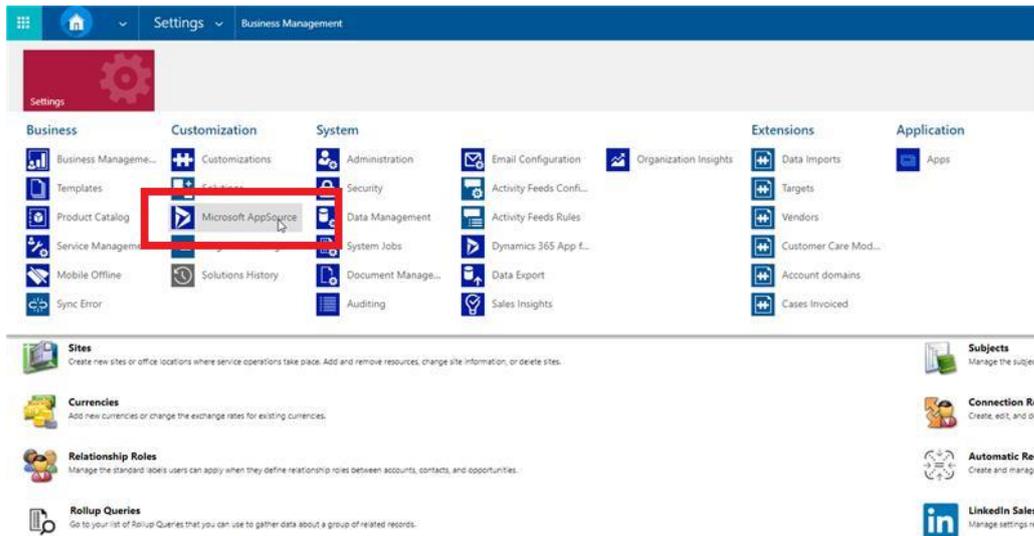
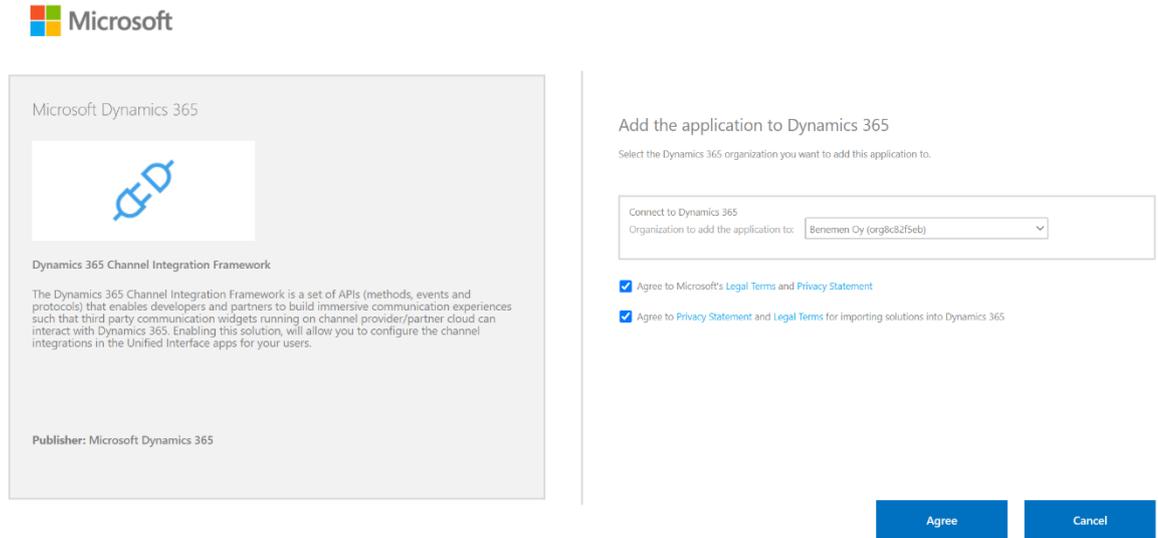*Figure 1 AppSource Dynamics 365 Channel Integration Framework*
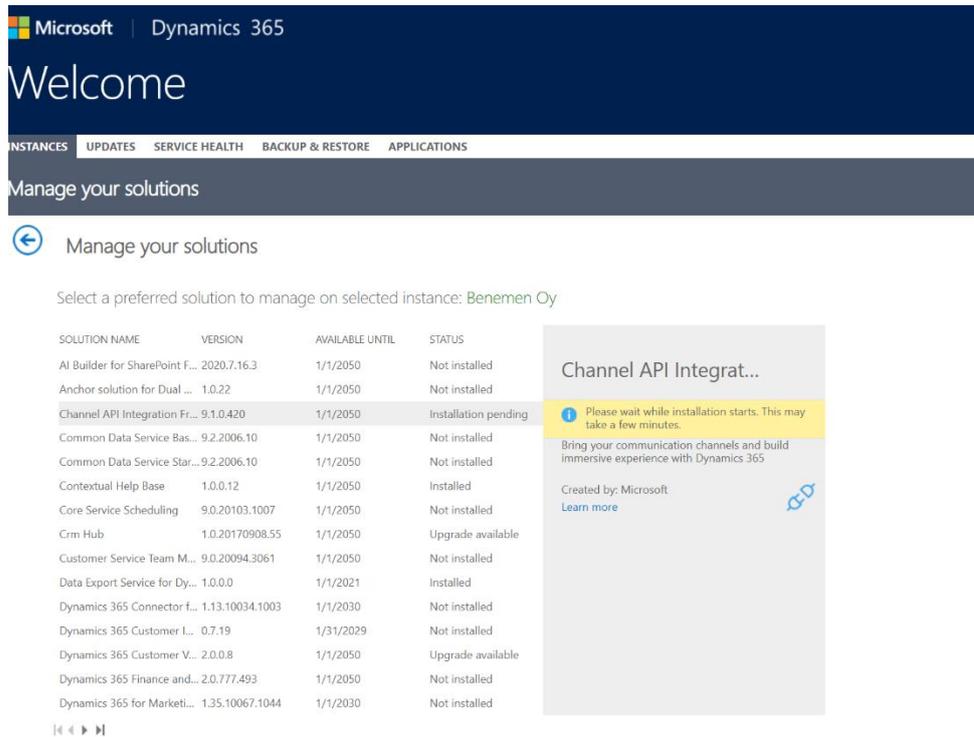
Figure 2 Agree to Terms

Figure 3 Install Channel Integration API

1.1.2 Provision Omnichannel

This section applies to customers that use Omnichannel capabilities in Dynamics 365, have *Digital Messaging or Chat* licenses and want to use BeneVoice in a multi-session app, like:

- Omnichannel for Customer Service
- Customer Service Workspace

To provision Omnichannel please follow the material provided my Microsoft:

https://docs.microsoft.com/en-us/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 (https://portal.azure.com)
- From the navigation menu, choose Azure Active Directory and Application registration
- Choose New Registration from top of the page

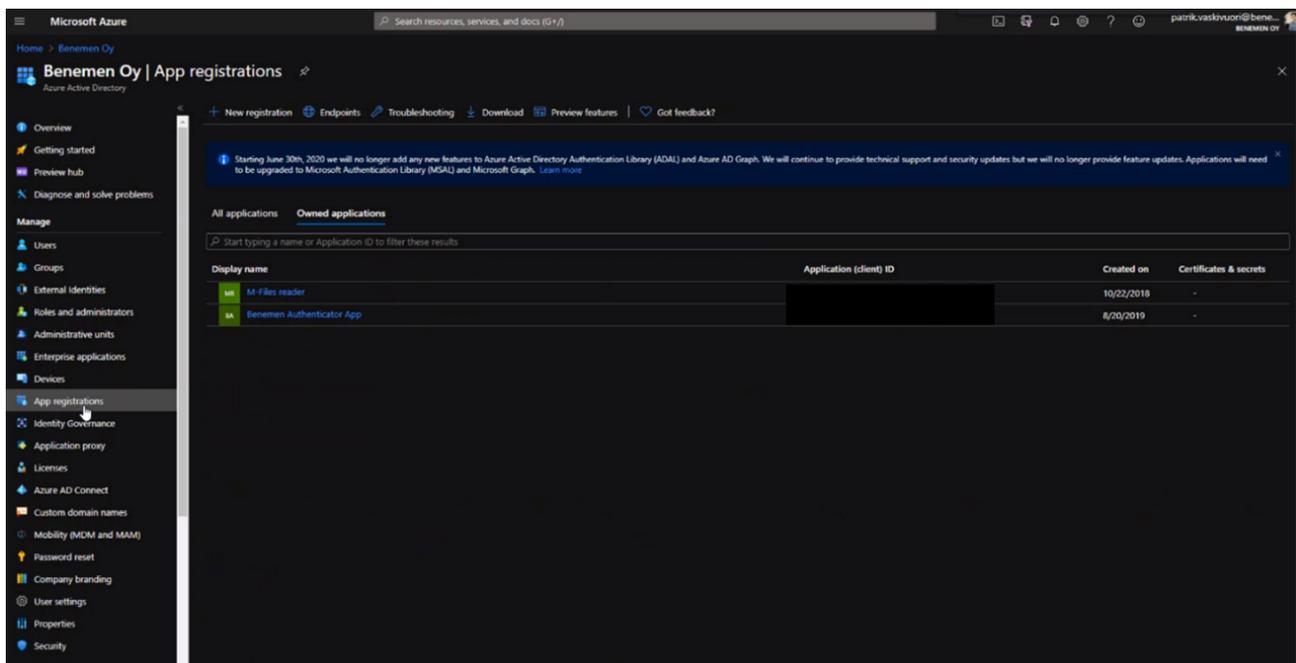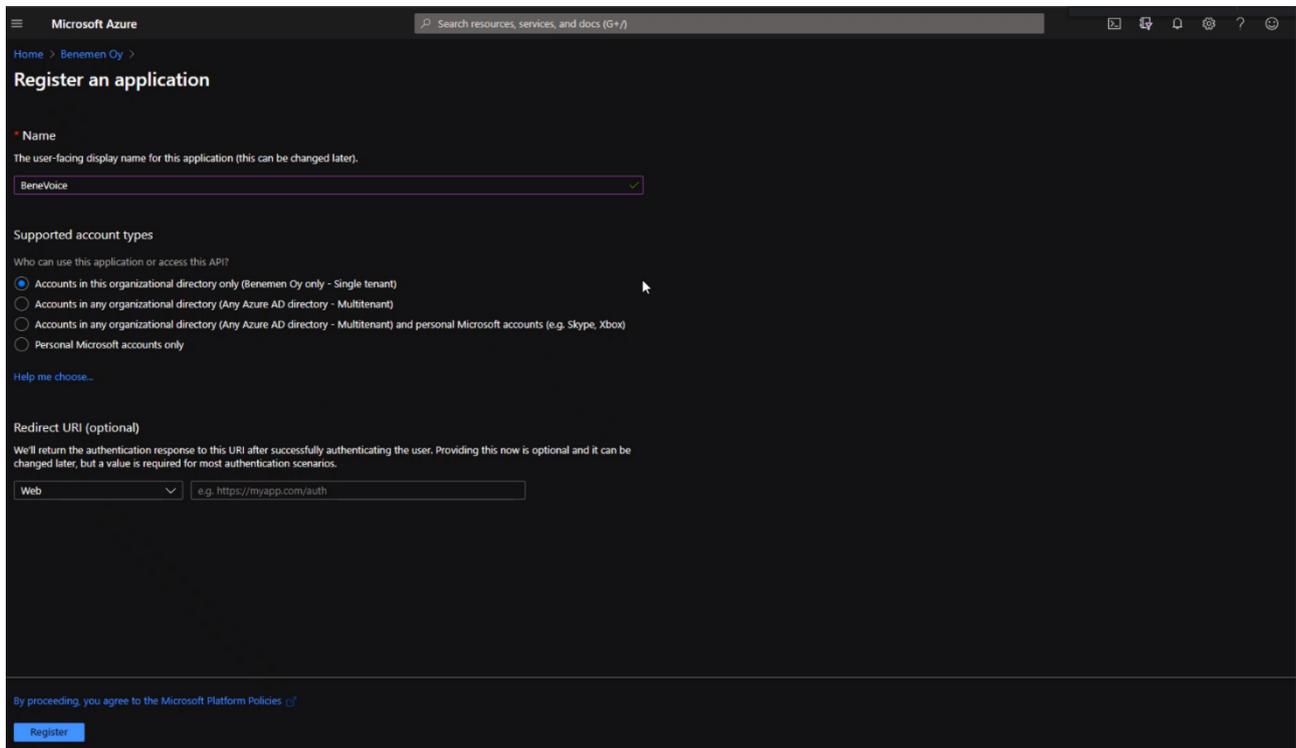*Figure 5 App registrations*

- 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.
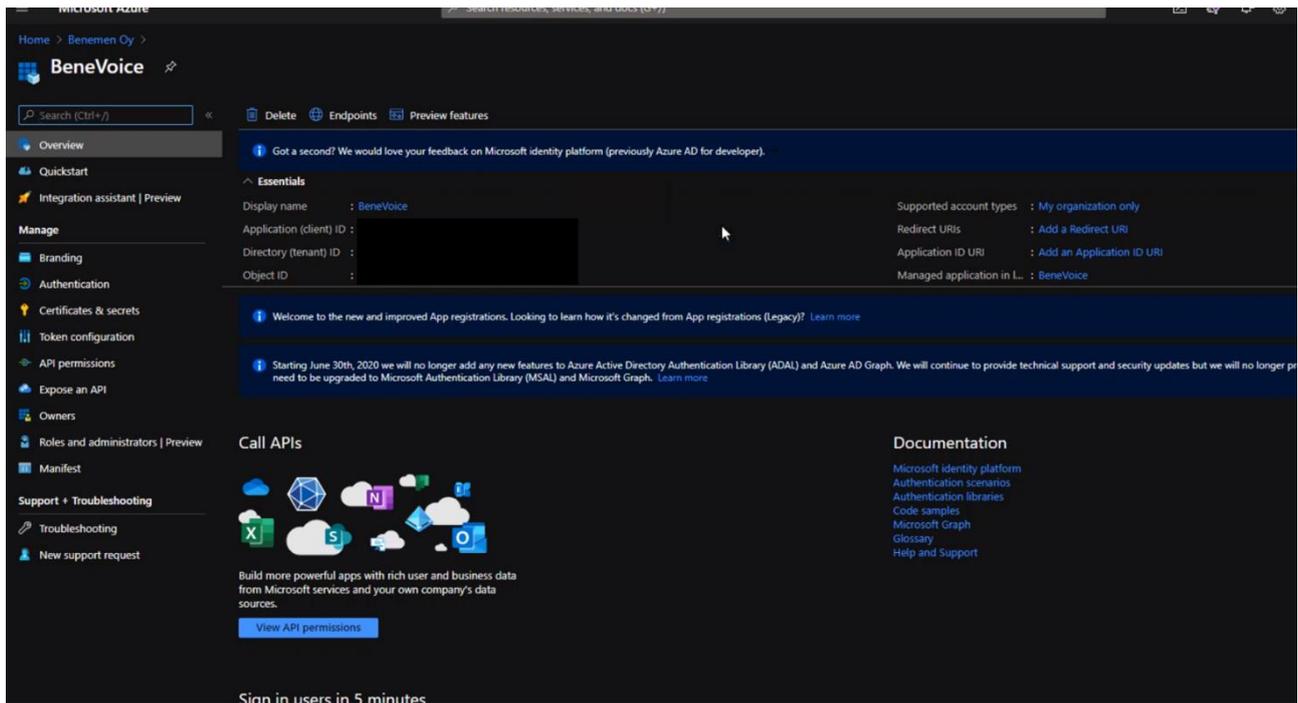- Once deployment is done, you should see a similar window than below:

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*
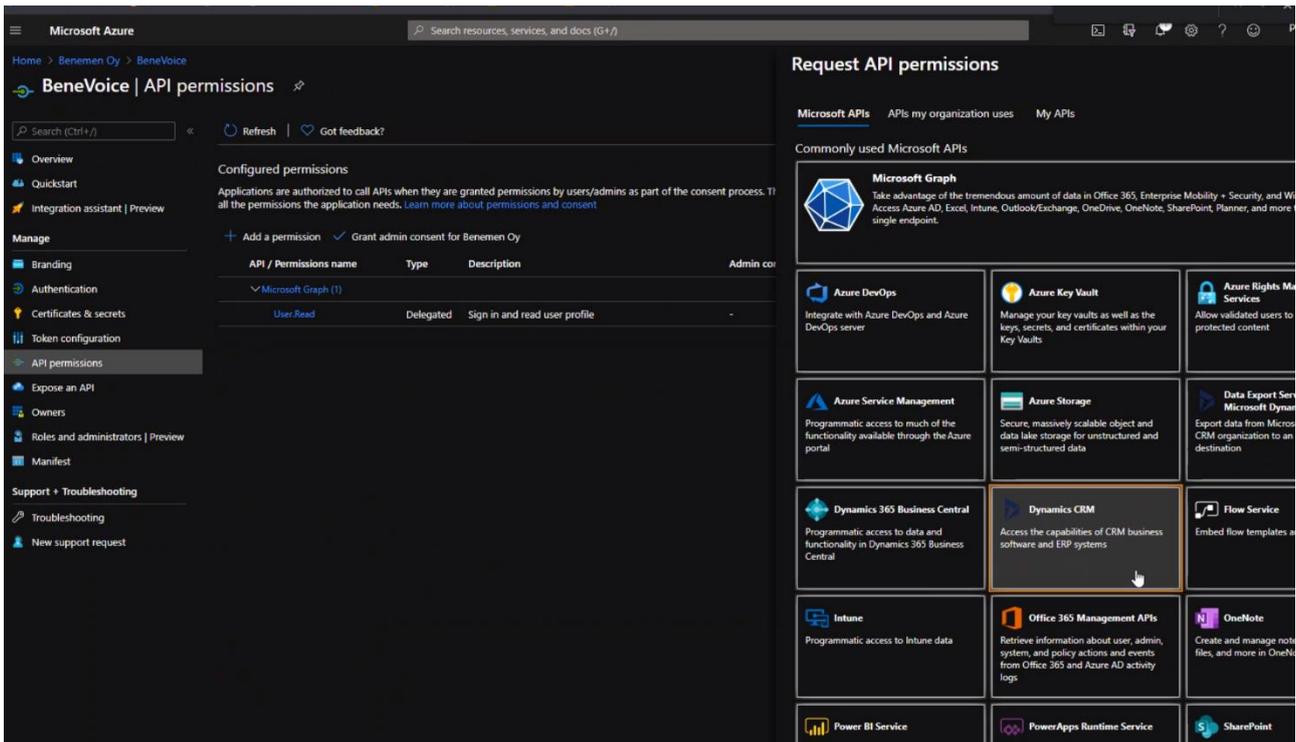- Select Dynamics CRM from the pop-up window:

Figure 8 API permissions

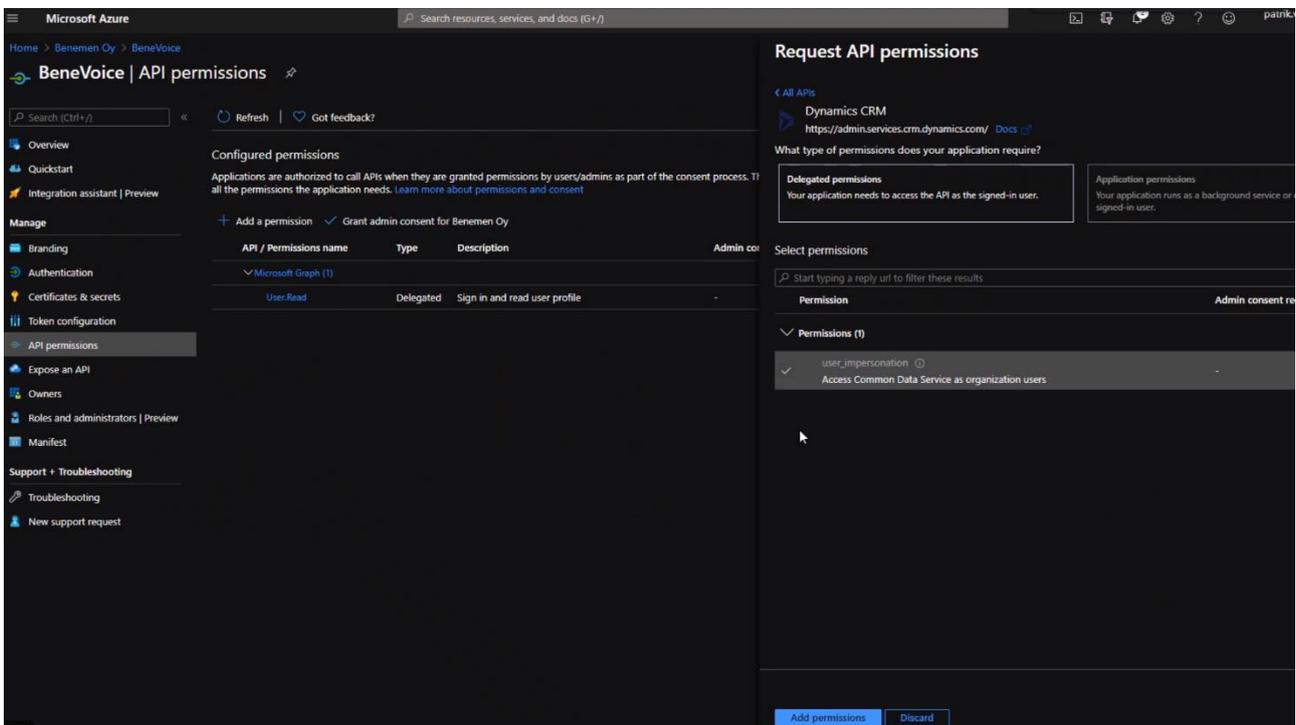- Tick user_impersonation selection and choose Add permissions

Figure 9 Add permissions

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

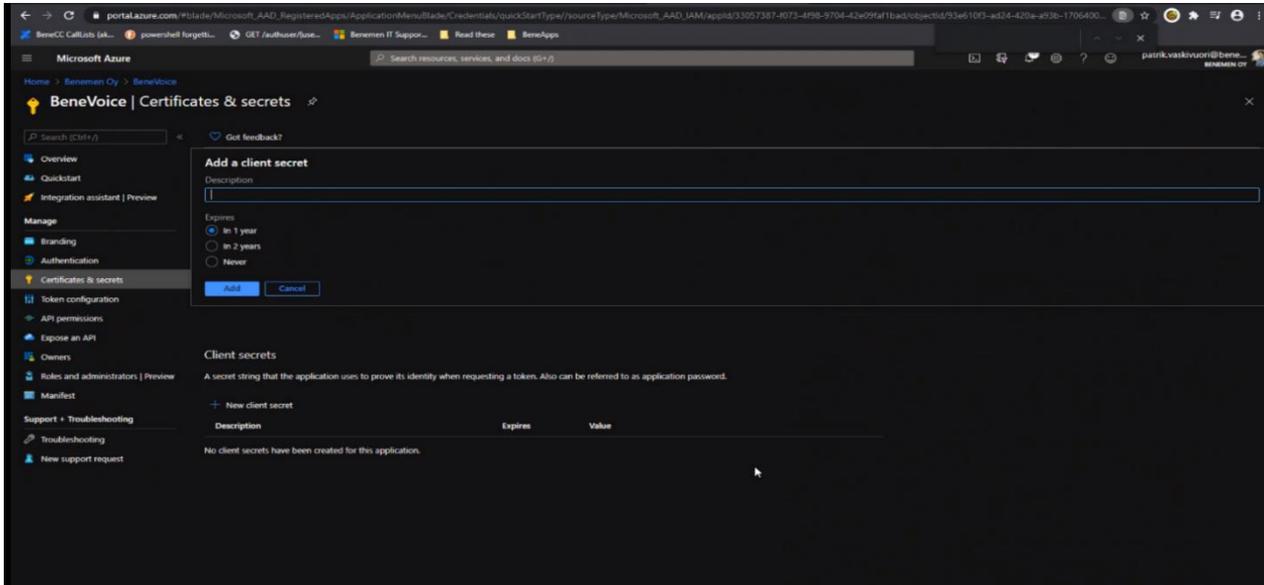**Save the secret key value into a secure place as it is not visible afterwards.**

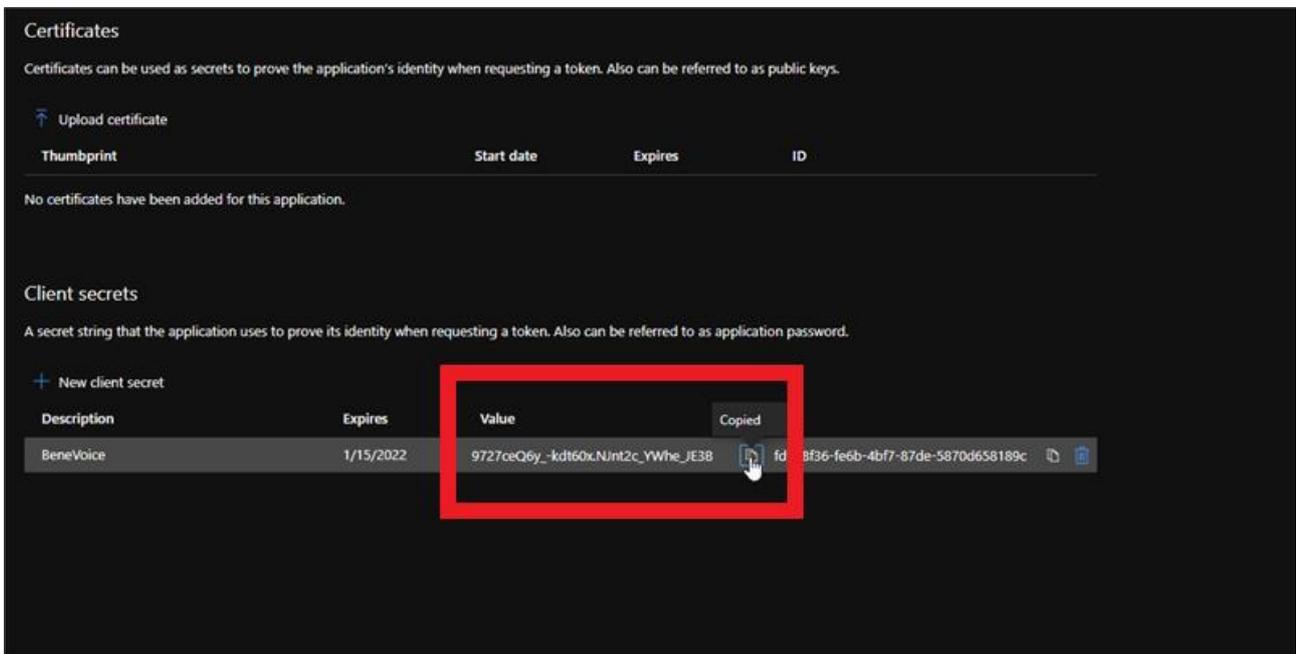*Figure 10 Add a client secret*

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*
- Multisession 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).
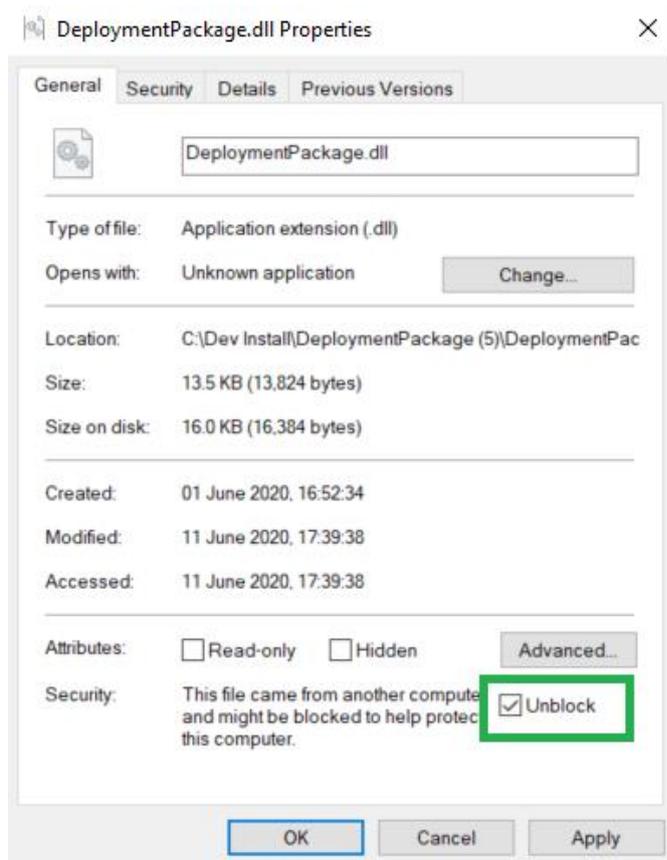
Figure 12 Deployment Package properties

- Then run PackageDeployer.exe and go through the standard wizard.
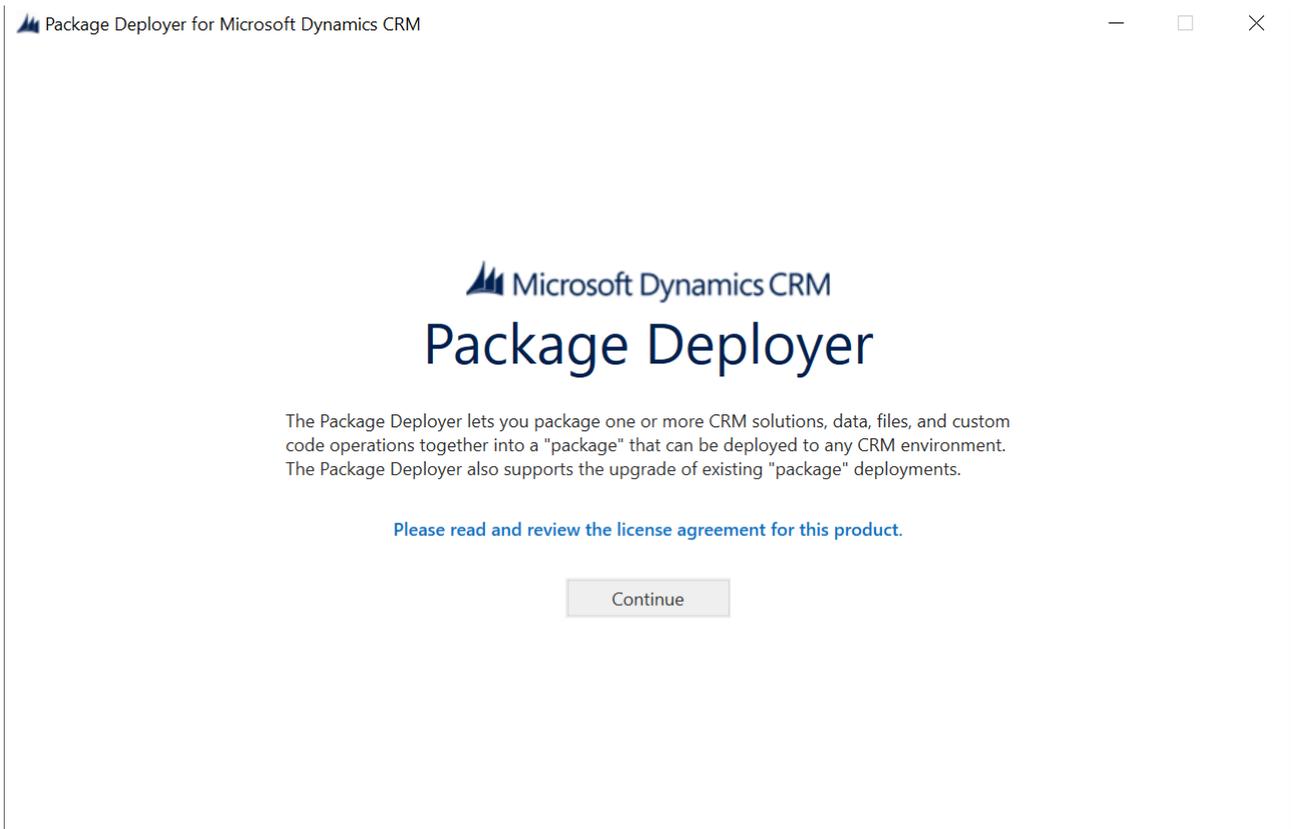- Wizard will guide the user through all the needed steps for installation.
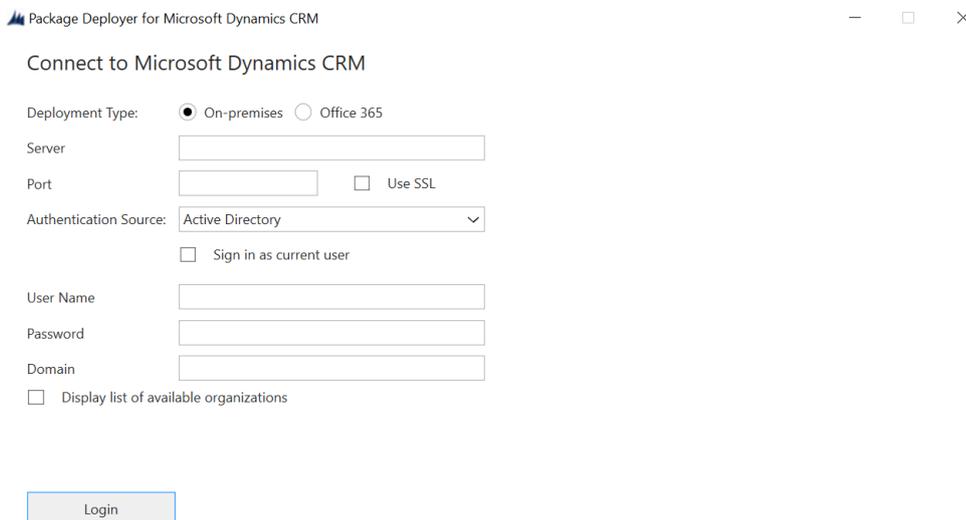
Figure 13 Package Deployer Wizard

Figure 14 Insert your company information

Figure 15 Company information example
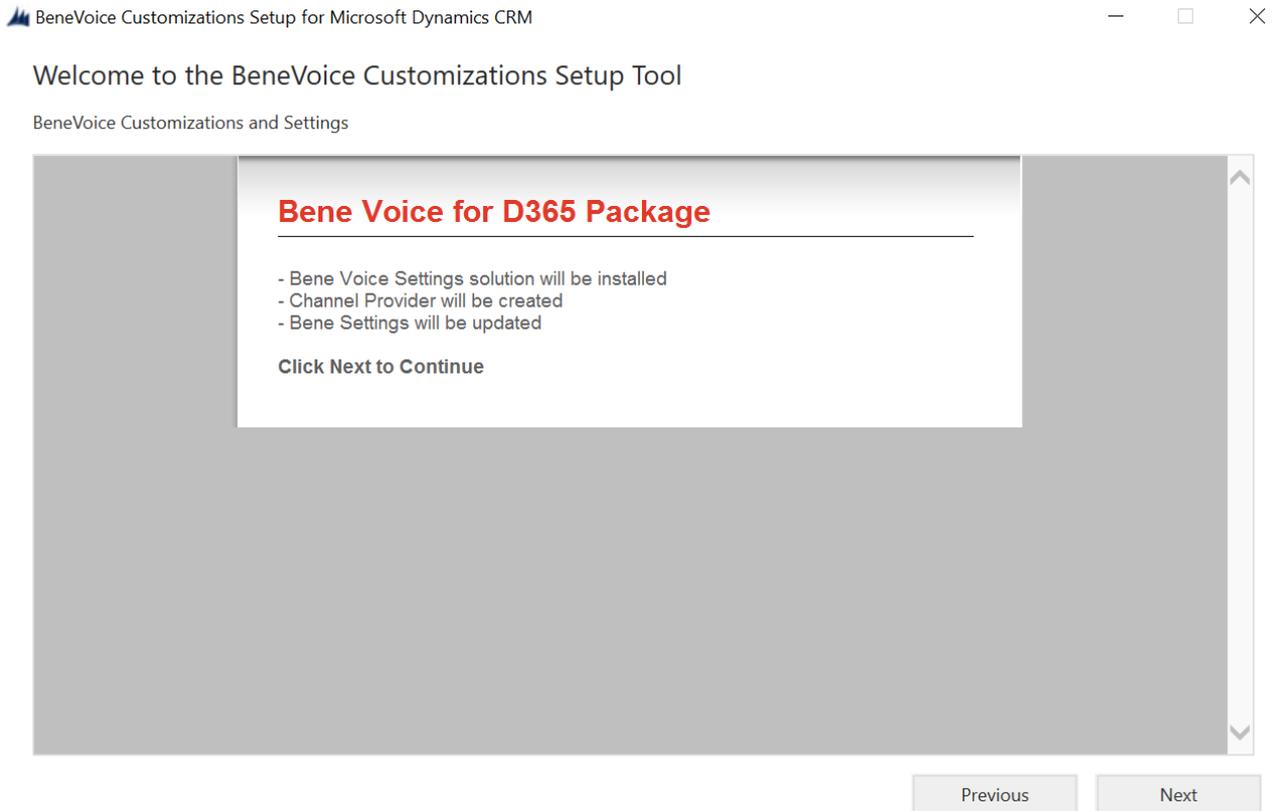

Figure16 Connect to Microsoft Dynamics CRM

Figure 17 BeneVoice for D365 Package

Figure 18 Ready to Install

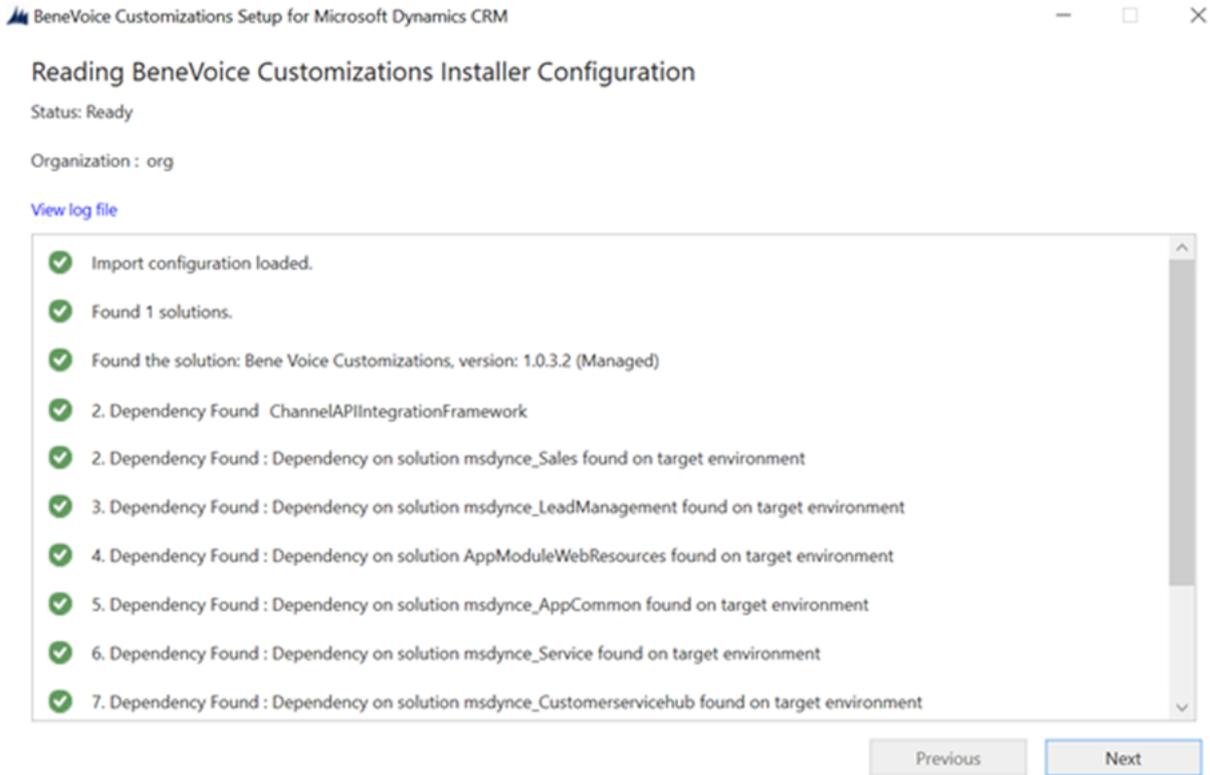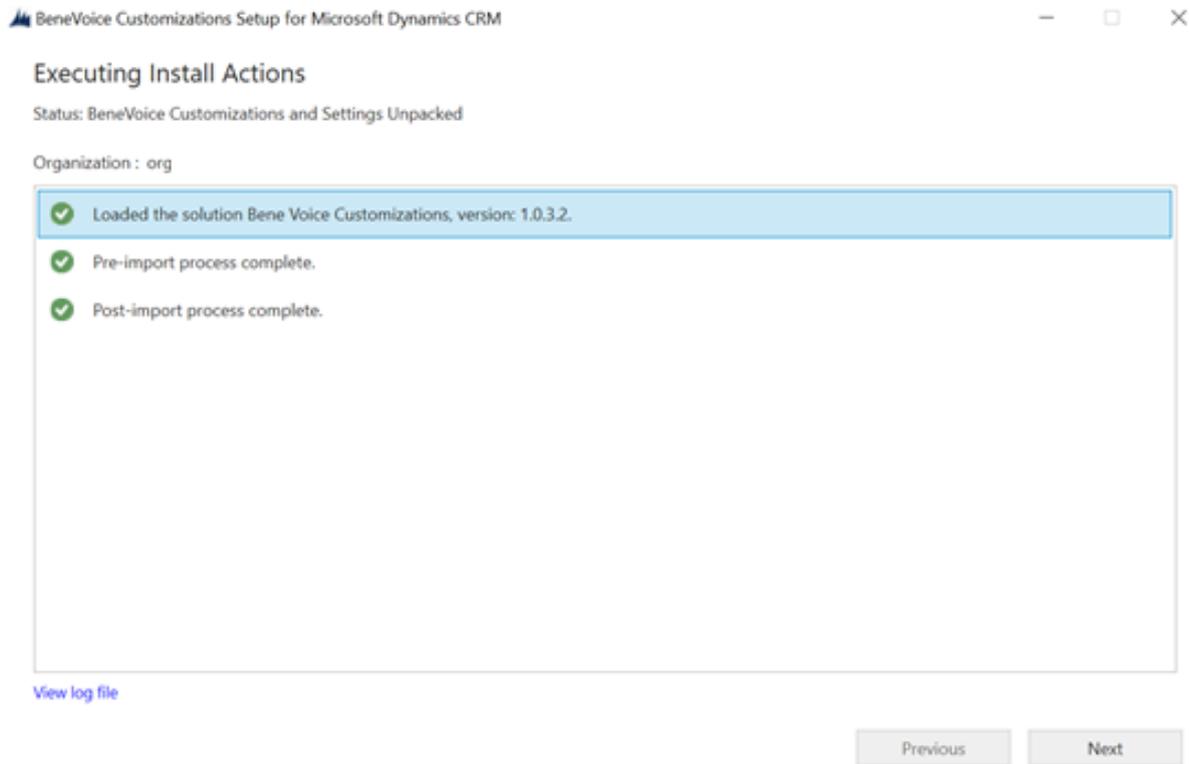*Figure 19 Installer Configuration*

Figure 20 Executing Install Actions

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)**

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.

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.
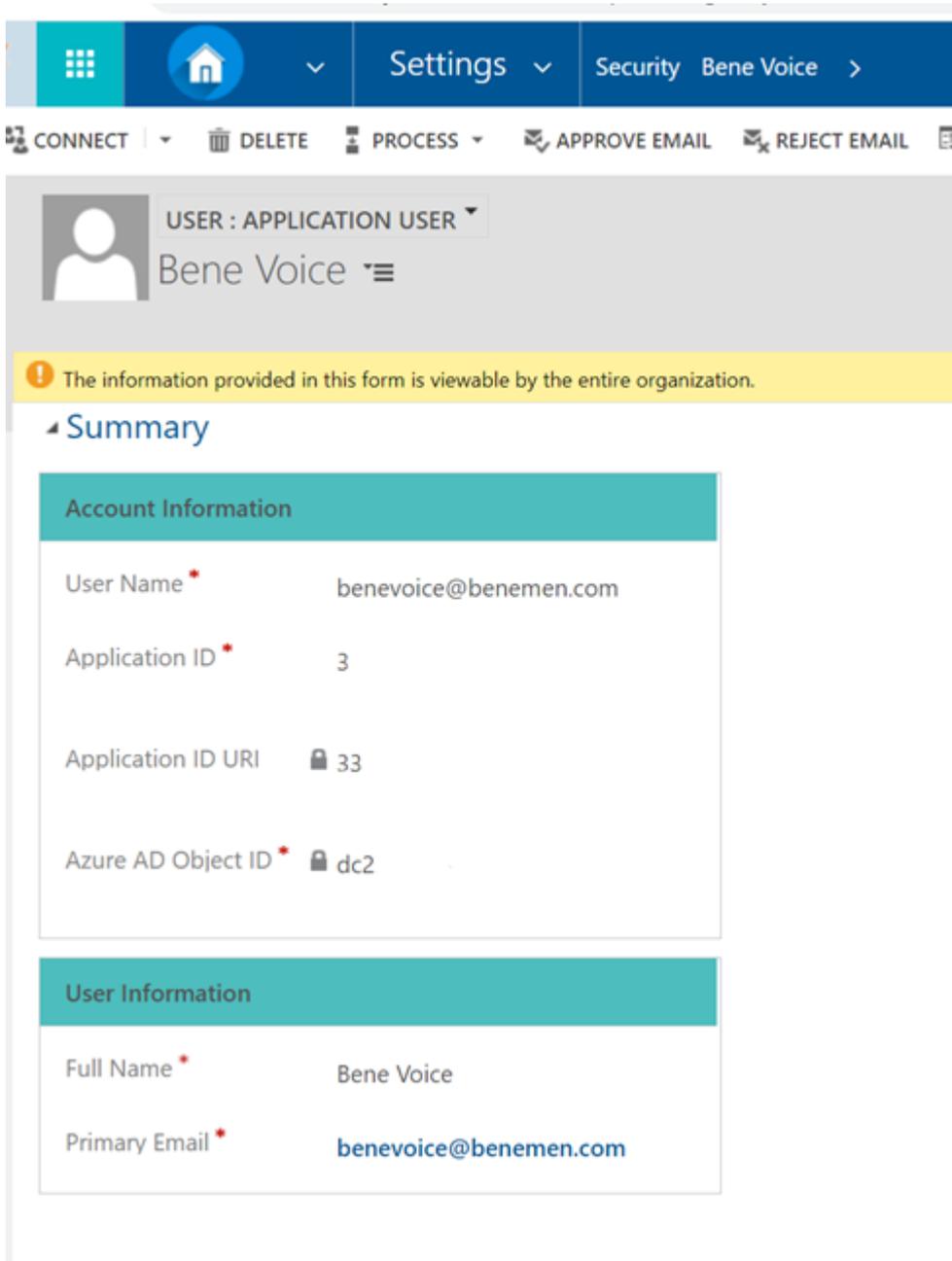
Figure 24 Application user saved

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

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:

Figure 26 Channel Integration Framework App

This configuration is used for customers not using the multisession capabilities and do not use Omnichannel licensing in their Dynamics 365 environment.
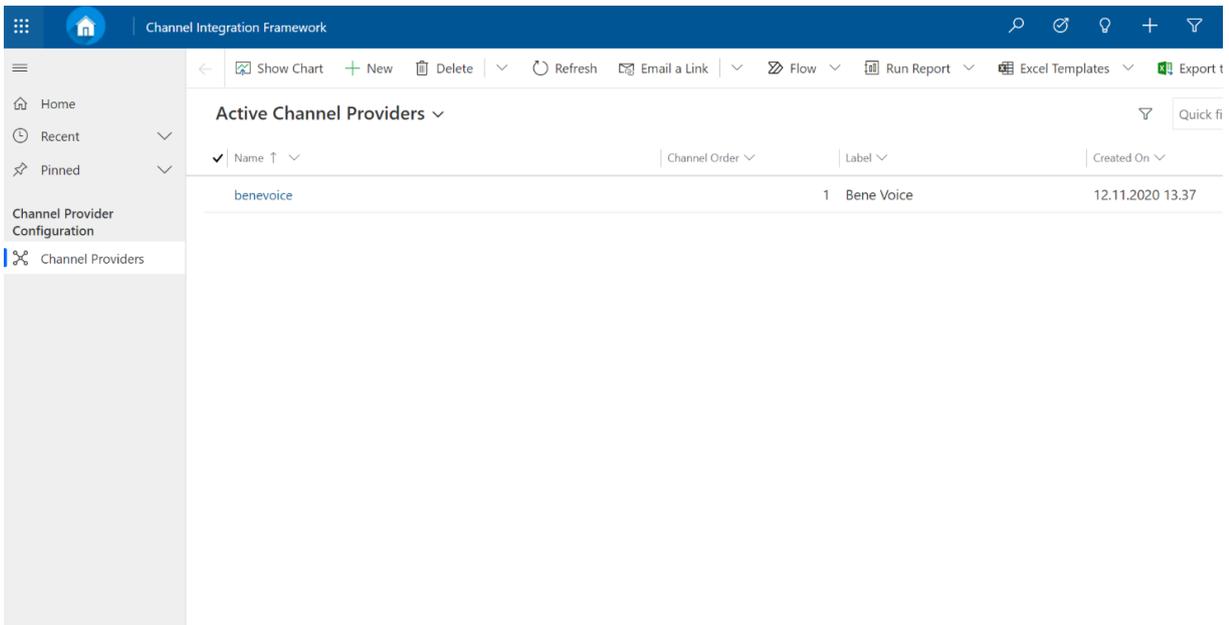
Figure 27 Active Channel Providers
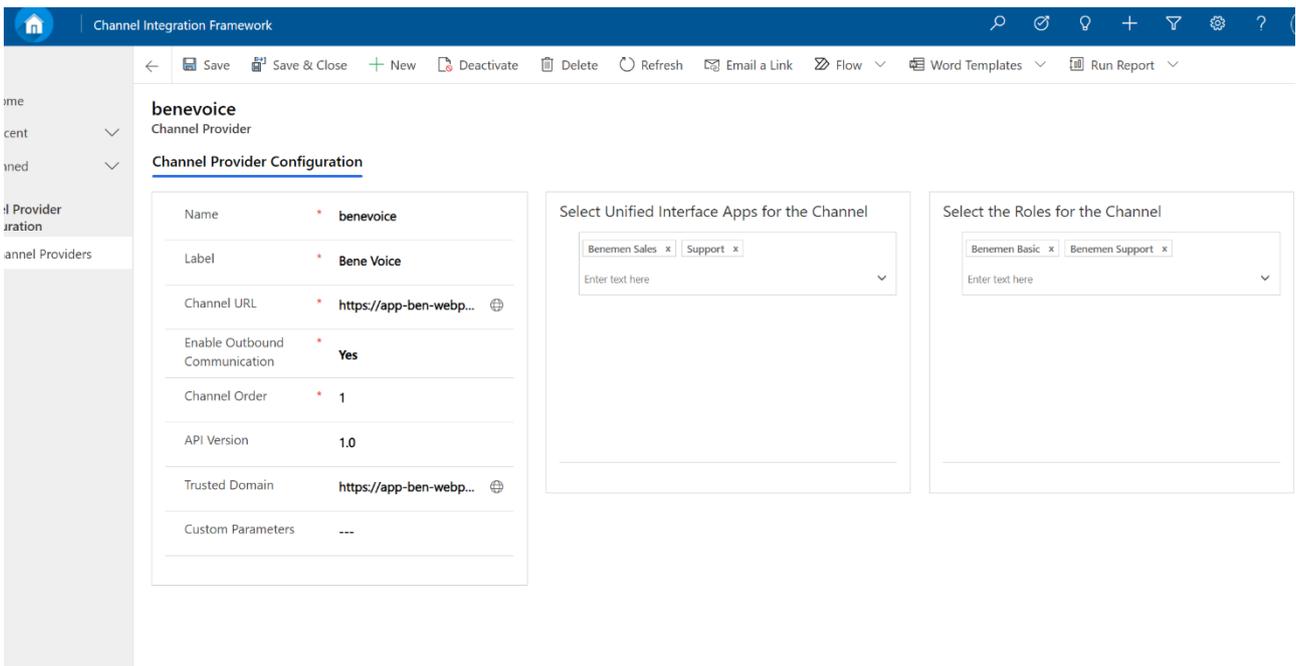
Figure 28 BeneVoice Channel Provider Configuration

Channel integration configuration record with settings is to be created with deployment package during the installation but needs to fill in access-based settings:
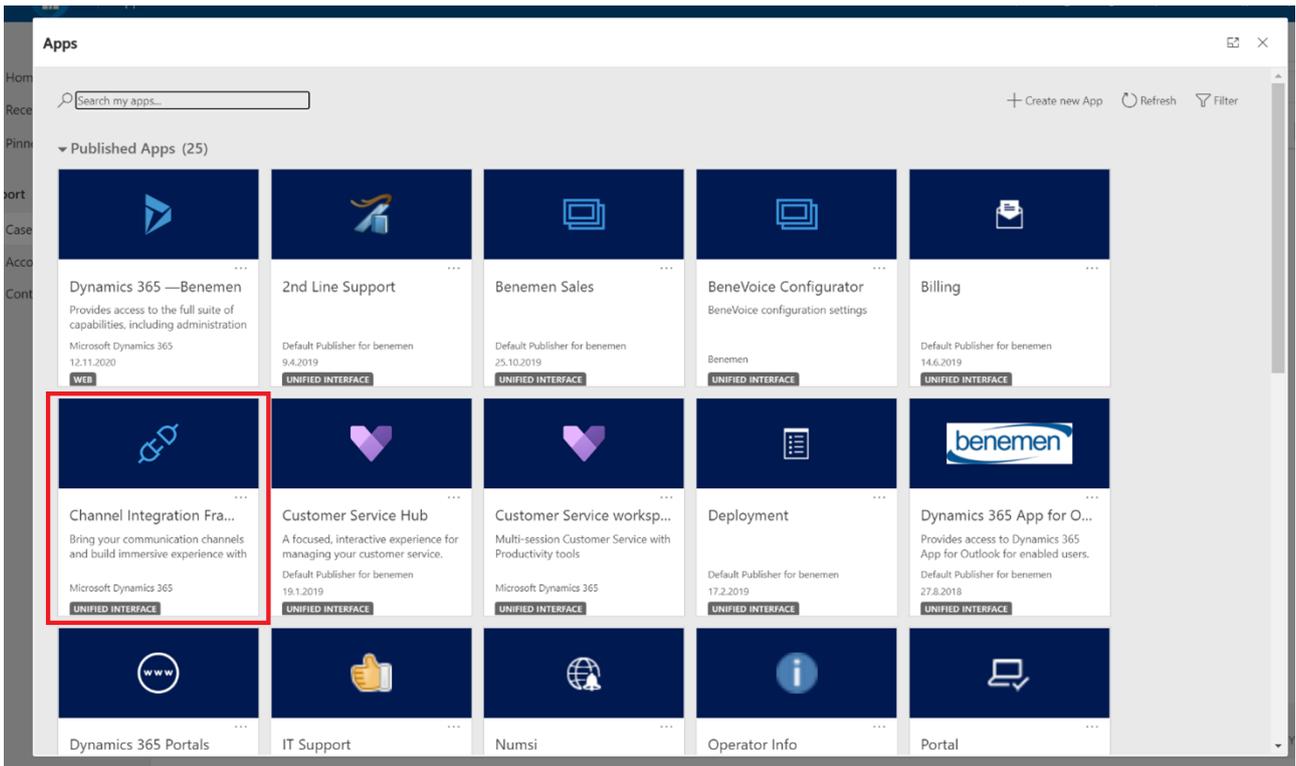
- Select which Apps and User Roles will have access to the channel provider.

See more about Channel Integration Framework configuration:

https://docs.microsoft.com/en-us/dynamics365/customer-service/channel-integration-framework/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 CIF2, follow the guide

https://docs.microsoft.com/en-us/dynamics365/customer-service/channel-integration-framework/v2/configure-channel-provider-app-profile-manager.

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
Unique Name	*	ben_voicechannel
Label	*	BeneVoice
Channel URL	*	<to be provided by Benemen deployment team>
Enable Out Bound	*	Yes
Channel Order	*	1
Api Version	*	2
Trusted Domain		<to be provided by Benemen deployment team>
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
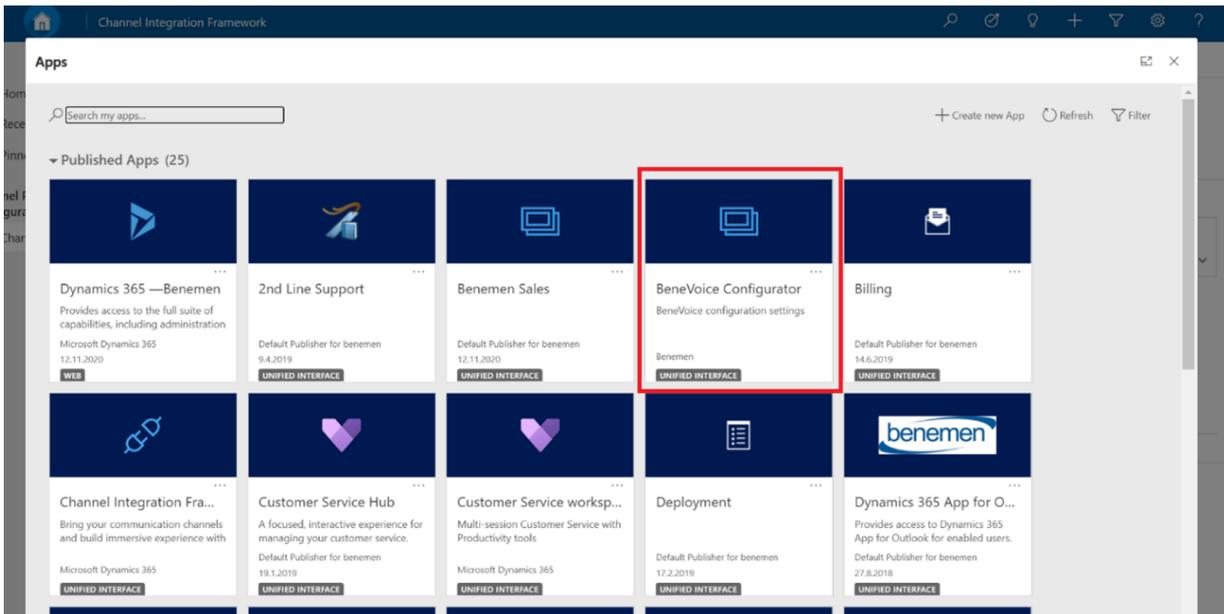
Figure 29 BeneVoice Configurator App

- Navigate to Users Settings and choose Update Bene User Ids –button (on top of the page)
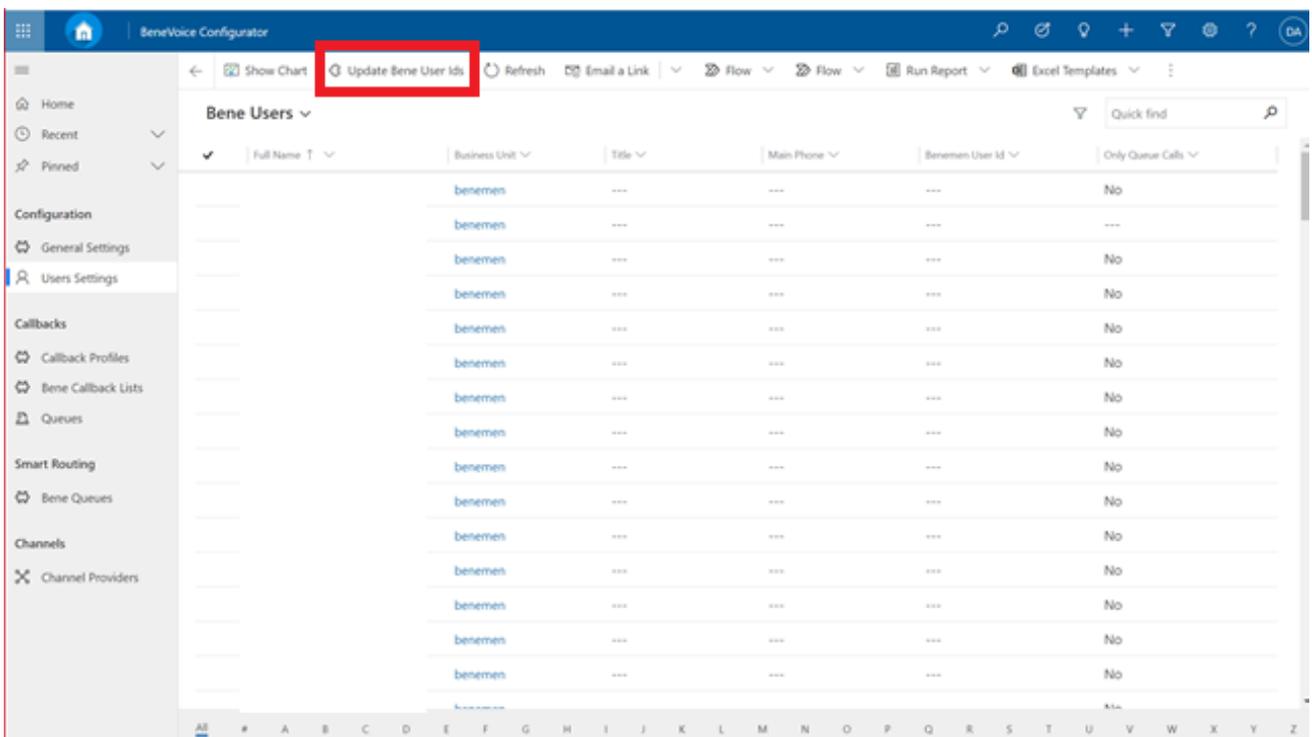
Figure 30 Update Bene User Ids

- 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.

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:
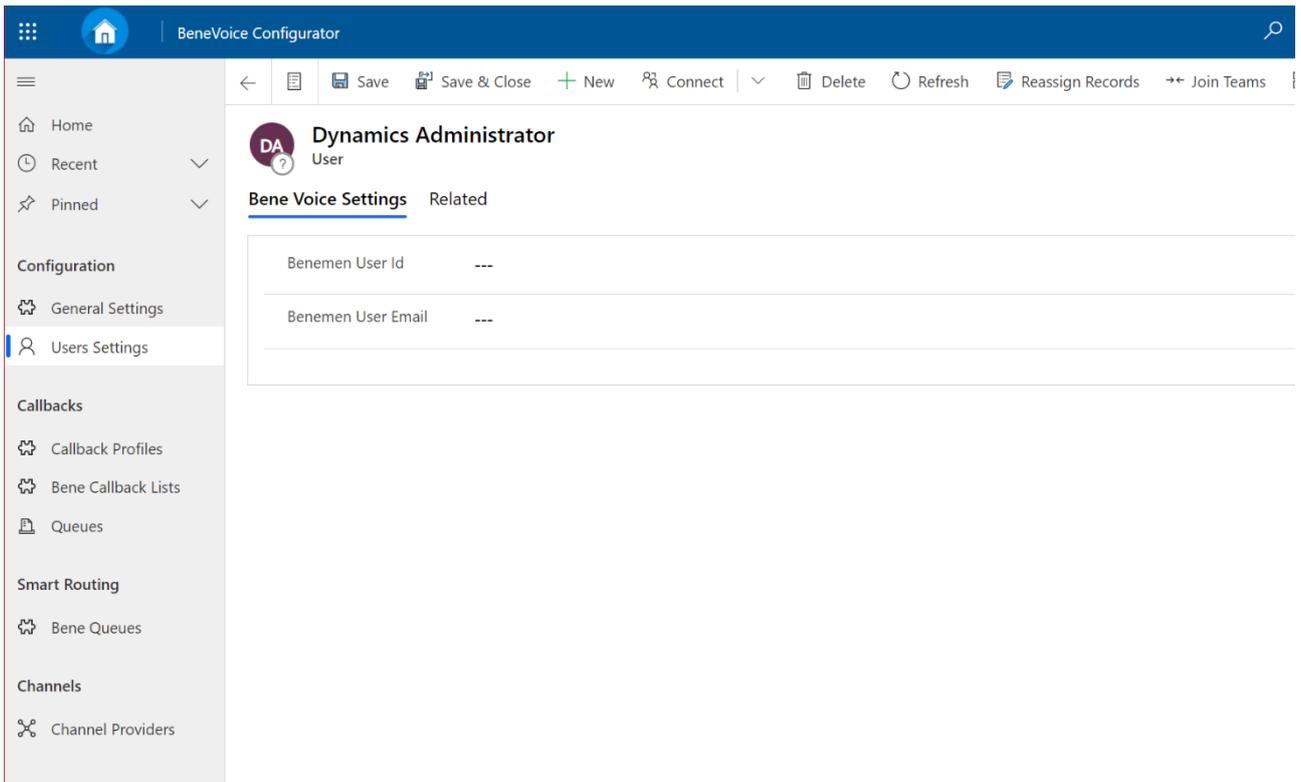
Figure 32 User record BeneVoice settings

- o **Bene User Id** – unique identifier of the user in BeneCloud
- o **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 (CIF2)

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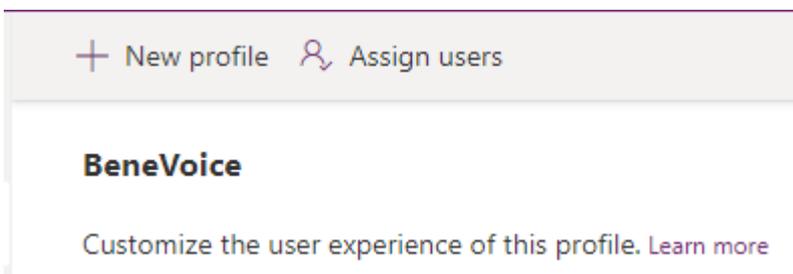
A view will open in Dynamics Unified Interface. Click *Add Existing User* and select the user(s) to be added.

1.5.3 Phonecall sync settings

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

Figure 33 Phonecall Sync Settings

Figure 34 DefaultCRMAssignee

- **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.
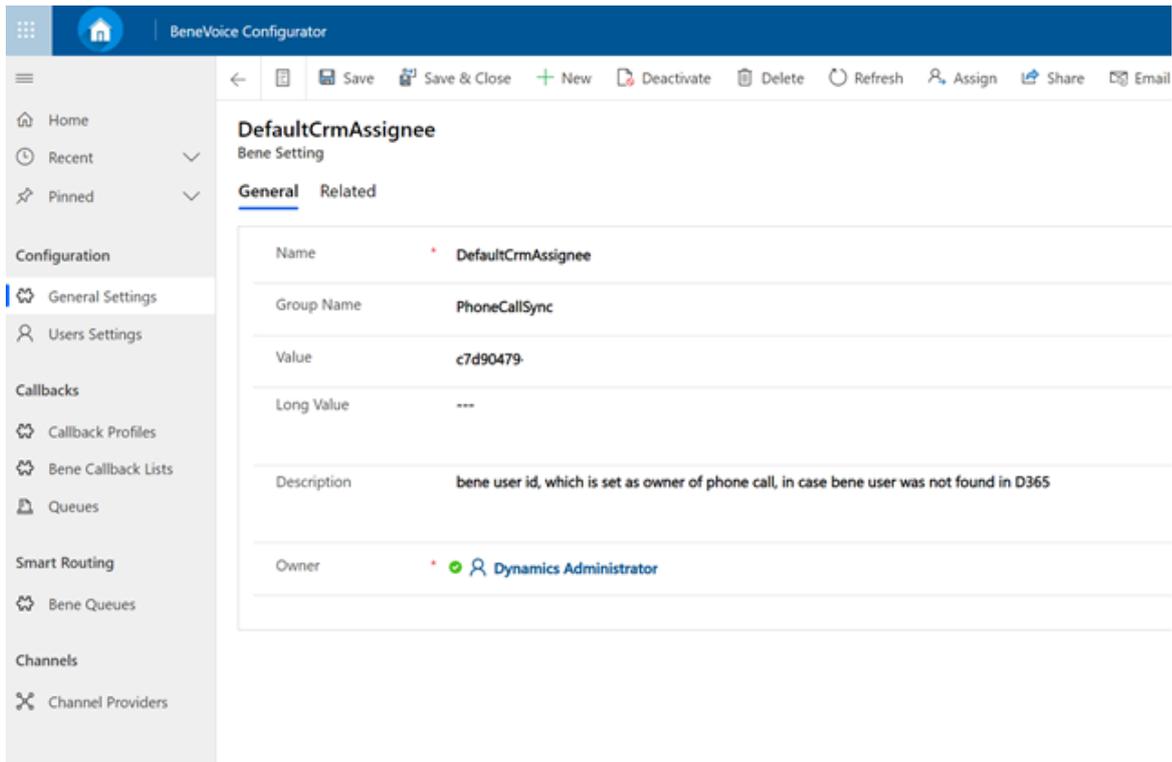- **EnableAudit** - boolean value, which defines to set in BenemenApiAudit field of a phone call in D365. In case it is false, the field will be set as CallId is {benemen call id}, in other cases, all the values retrieved from the Benemen regarding this phone call will be set.
- **EnableMultipleMatchCreate** - 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:
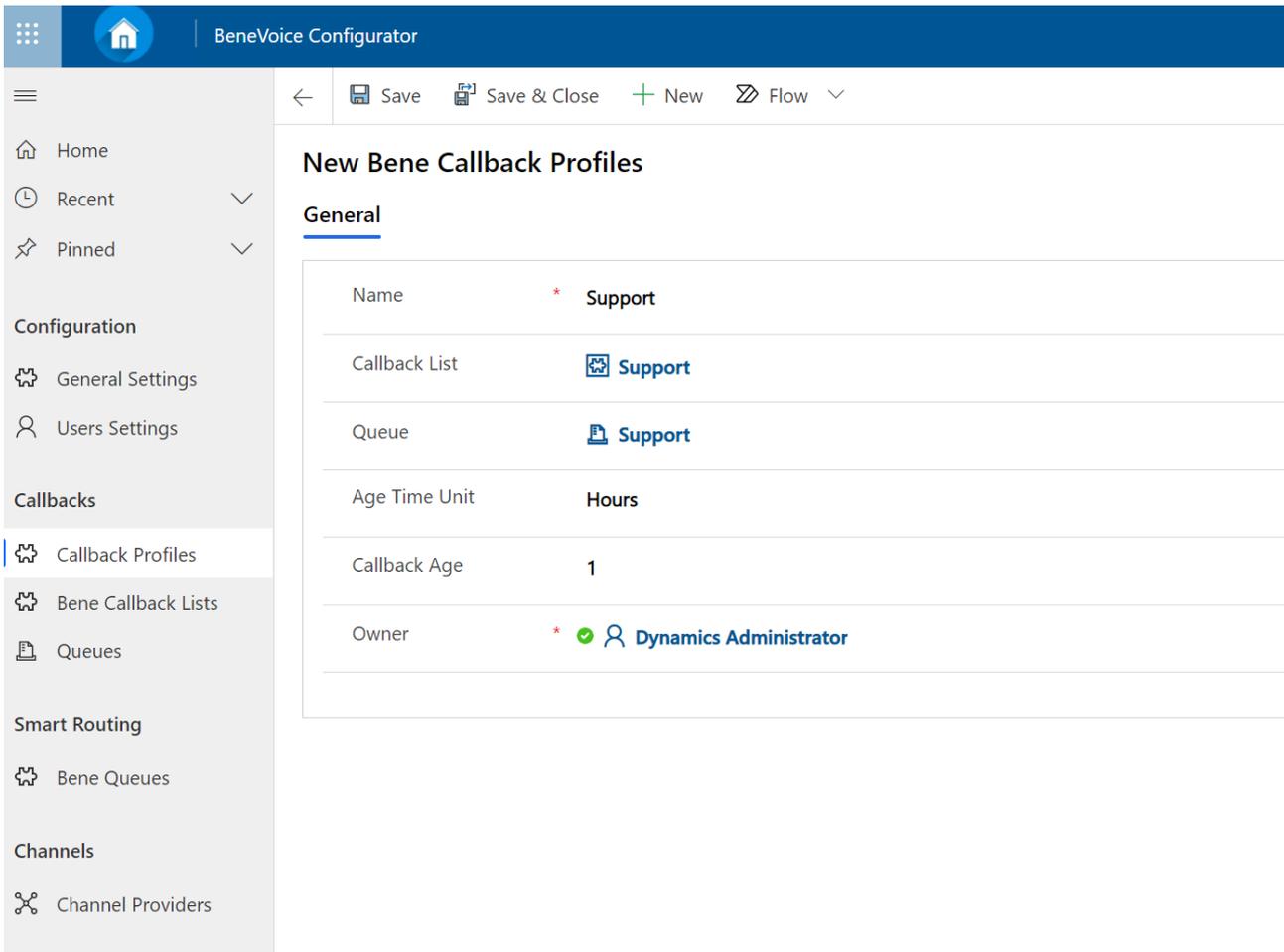
Figure 35 Callback Profile Example Settings

- **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)
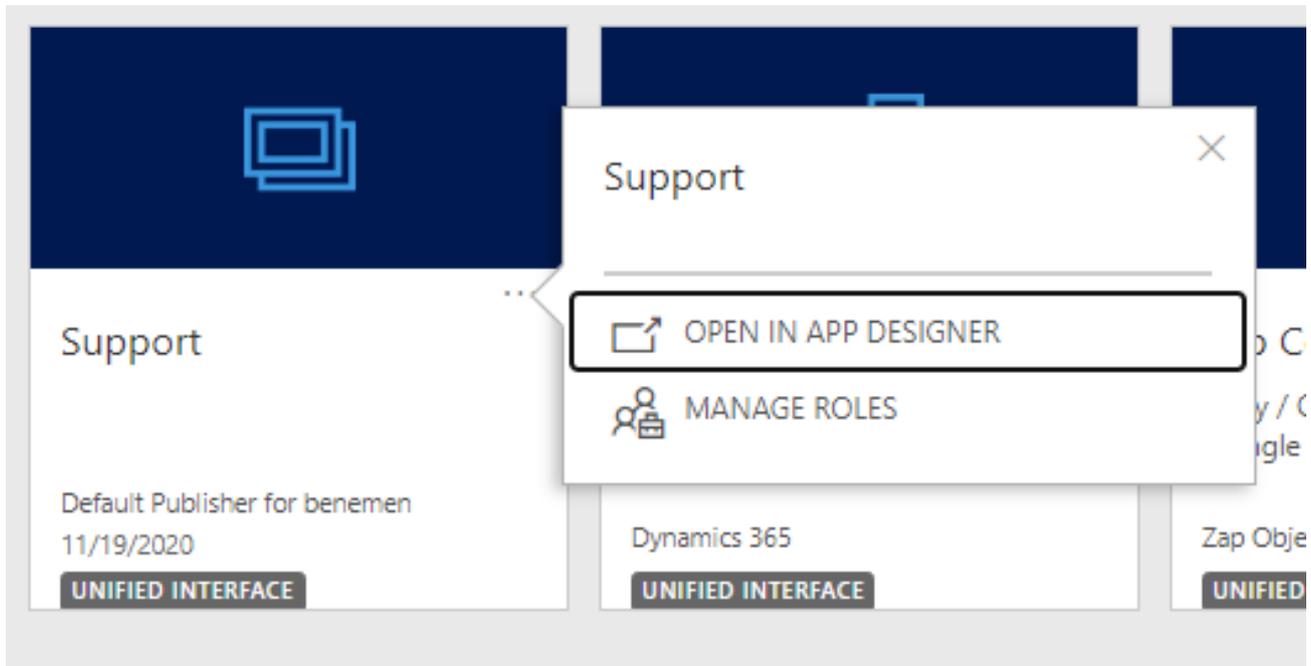

Figure 36 Open in App Designer

- Add Phone Call entity to the list of entities, if it is not already included
- Change the Main form to BeneVoice – Phone Call
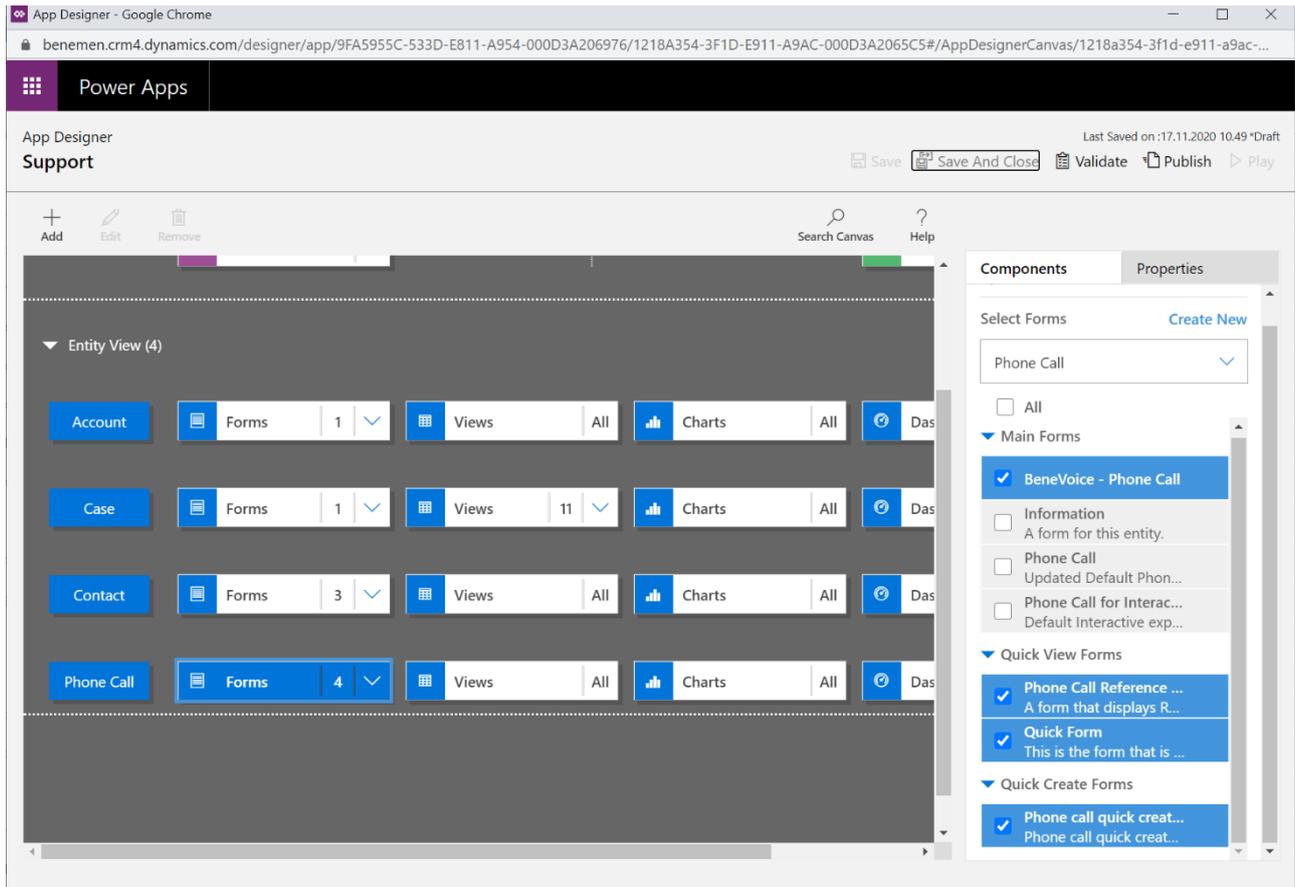- Include Quick View and Quick Create Forms to the app solution.

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.
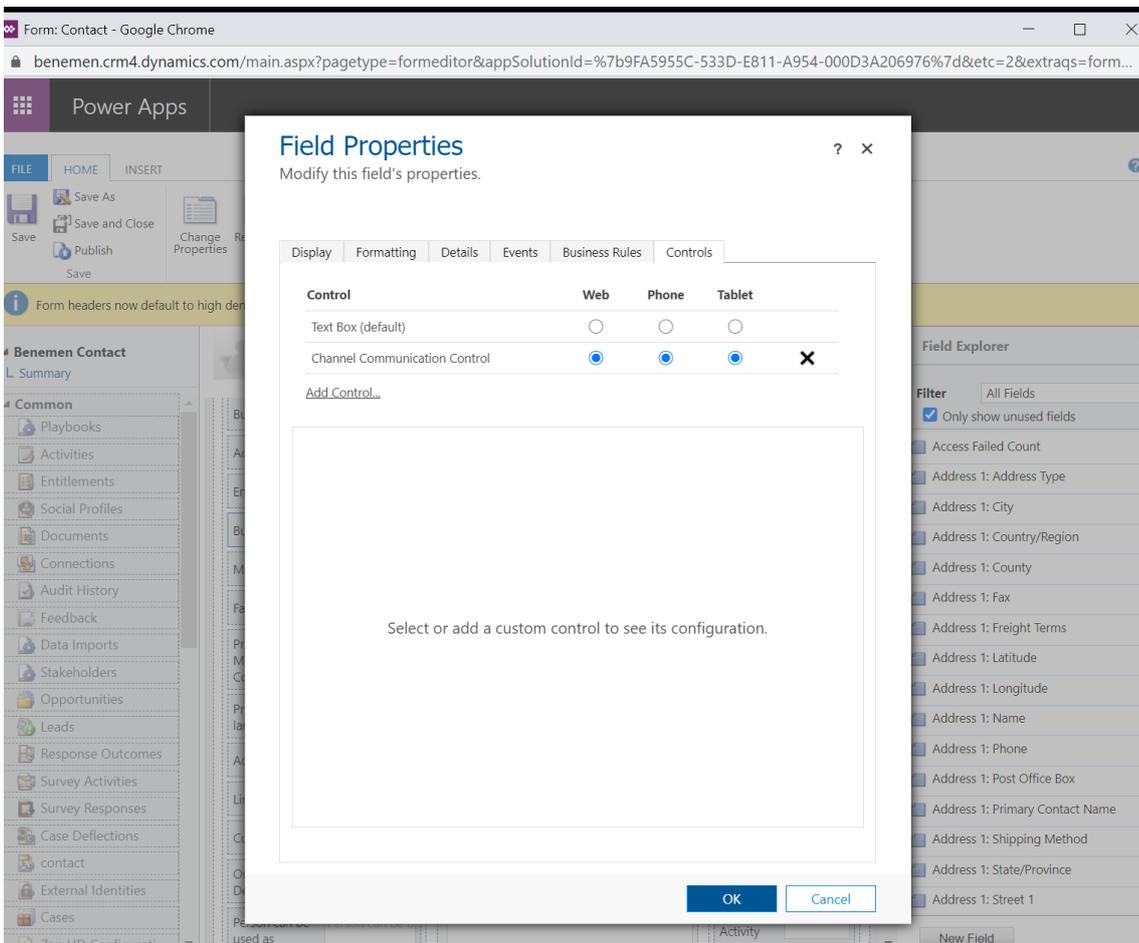- Select the radio buttons to Channel Communication Control

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.
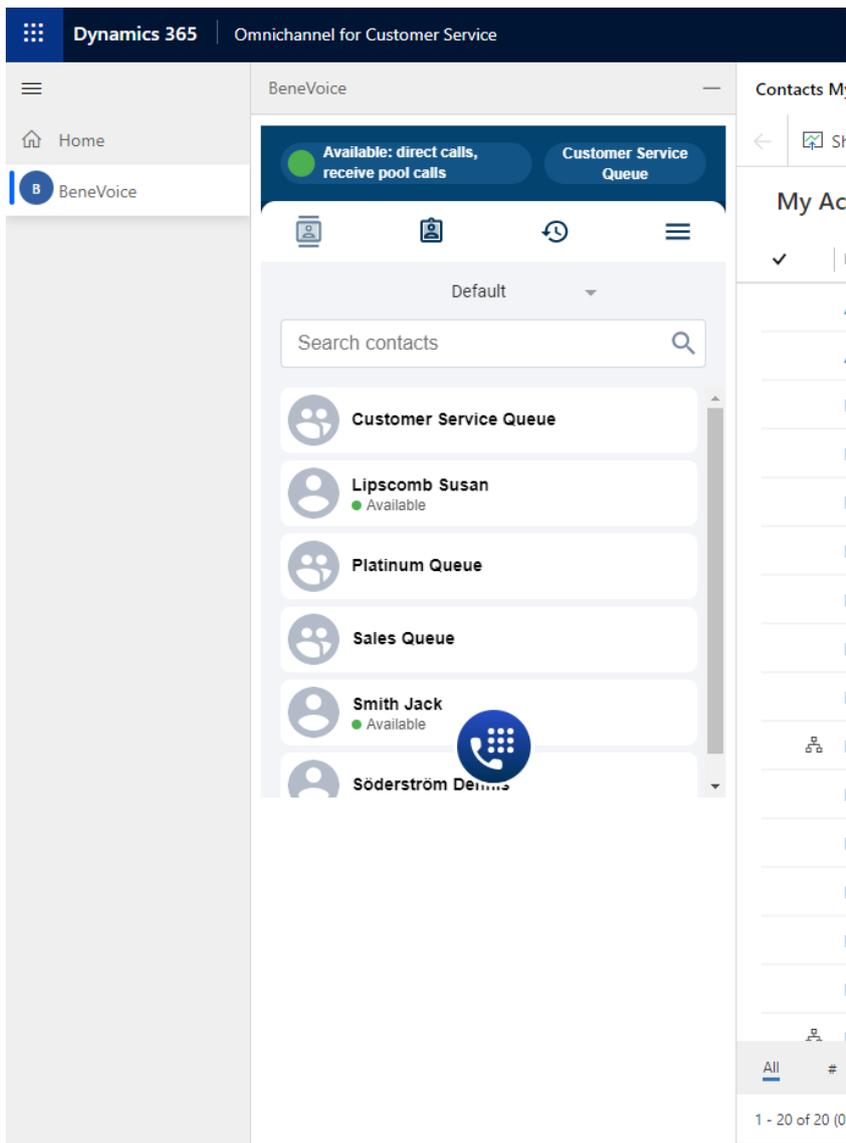

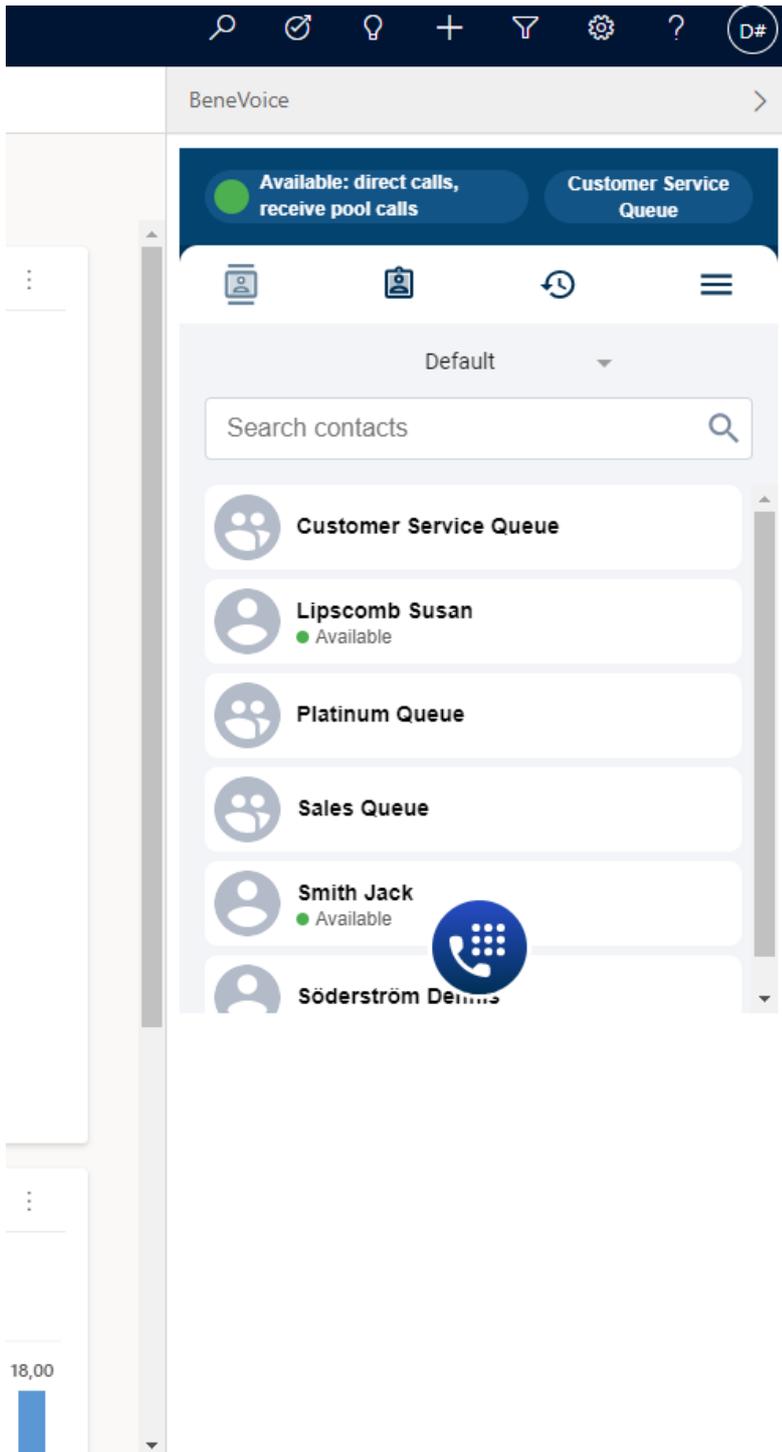*Figure 39 BeneVoice for Dynamics 365, Omnichannel (On the left side of Dynamics 365 UI)*

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