



BENEVOICE FOR DYNAMICS 365

Use Cases & Functionality

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1 Introduction

The purpose of the document is to describe use cases and functionalities of the BeneVoice for Dynamics 365 solution.

The document covers softphone use cases for BeneVoice web phone. If using BeneDesk for Windows softphone, login and softphone usage is different than described in this document.

1.1 Pre-requisites

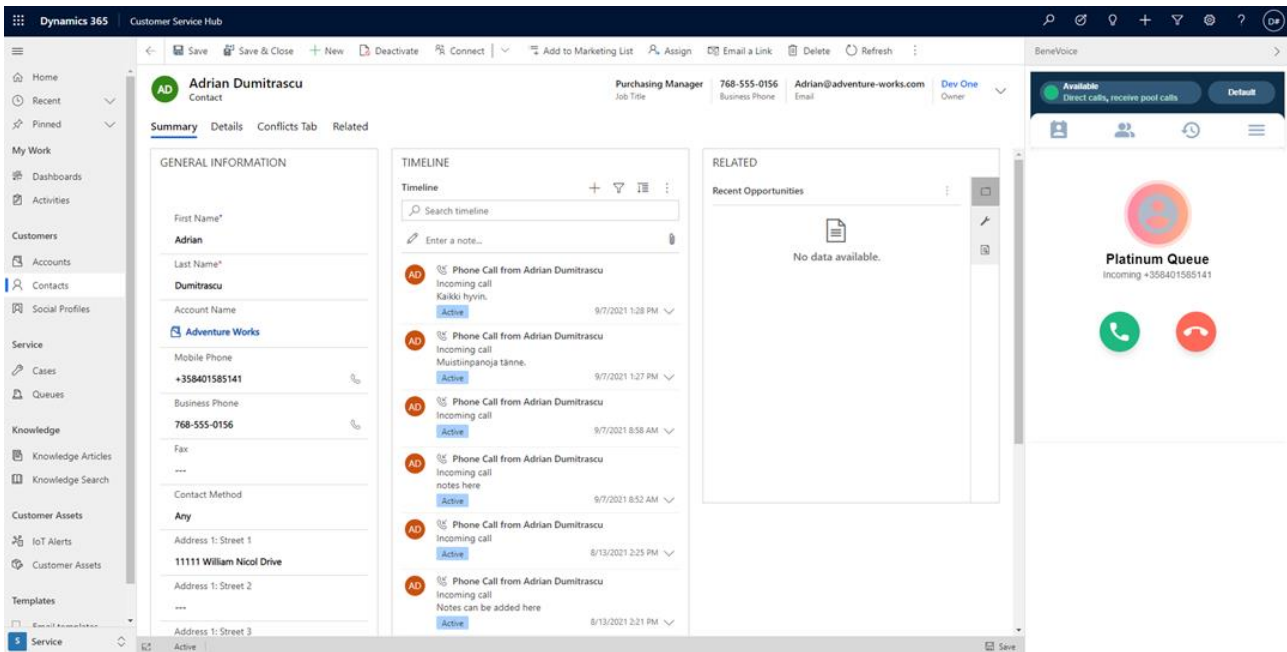
- Customer's Microsoft Dynamics 365 org. and needed Dynamics 365 apps are activated for BeneVoice for Dynamics 365 usage.
- End user is activated for BeneCloud for Dynamics 365 both Microsoft Dynamics 365 org. and BeneCloud.
- End user's BeneCloud user role must include BeneVoice web phone usage in-order to use workstation-based phone use cases. "BeneVoice User"-role privileges in D365.
- Embedded BeneVoice web phone in Dynamics 365 is supported using Chrome web browser.
- Please save all phone numbers to Microsoft Dynamics 365 in exact E. 164 format.
E.g. +358123456789

1.2 Login to the solution

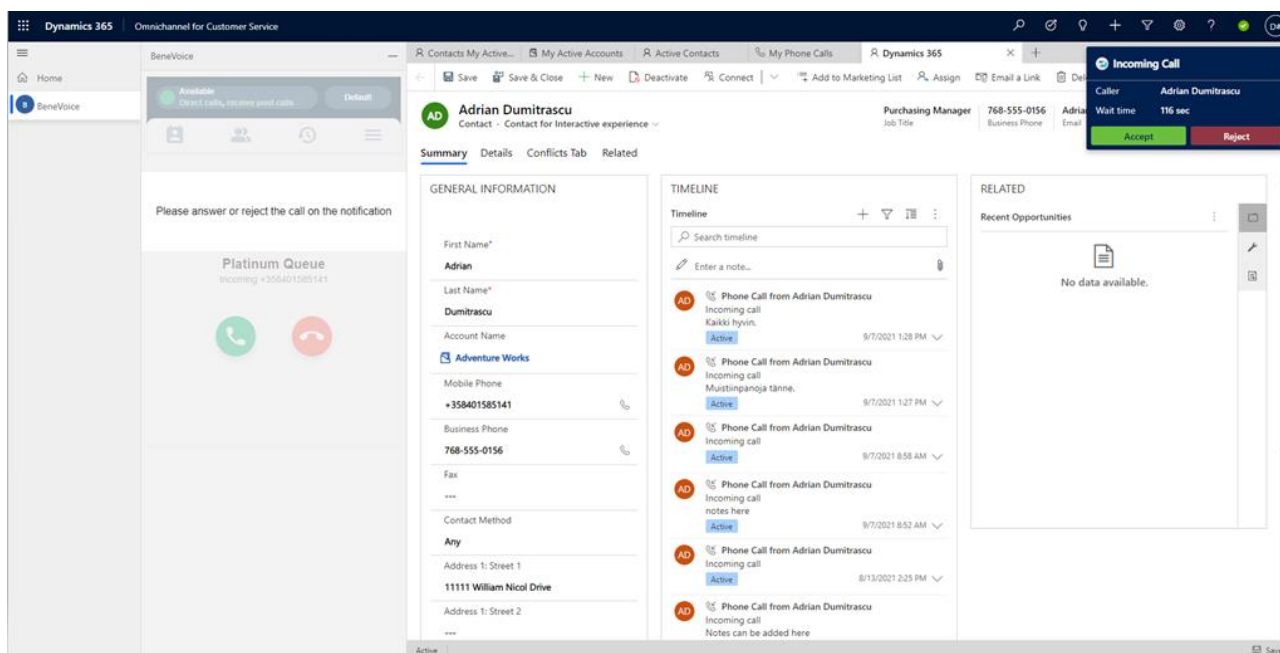
- 1) User logs in as normal to Microsoft Dynamics 365 web user interface
 - 2) User opens any Dynamics 365 app, where also BeneVoice for Dynamics 365 is activated.
 - 3) BeneVoice web phone panel is visible on the right side of Dynamics 365 App UI (without Omnichannel) or on the left side of the App UI (Omnichannel use). Benevoice for Dynamics 365 will log in automatically. Please allow the microphone use / access by the Chrome browser.
 - 4) BeneVoice web phone is used for controlling phone calls, managing voice channel availability status and caller phone numbers.
-

Important notes:

- BeneVoice web phone shall be used in a single Dynamics 365 browser view / tab, where new views and pages are opened within the same single browser view / tab.
- **Avoid** refreshing the whole browser view / tab (e.g. Ctrl + F5). Instead, if you need refresh information on the active page, use built in Dynamics 365 options (**use refresh-button on the Dynamics 365 ribbon**) for doing so. This ensures that BeneVoice web phone continues functioning as normal.
- If you refresh the whole browser view / tab, the BeneVoice web Phone logs out and then logs in again. Active phone call is also disconnected and no incoming calls can be received if you refresh the whole browser view / tab.



CIF version 1.0, single-session Dynamics 365 model-driven apps (Communication panel on the right side)



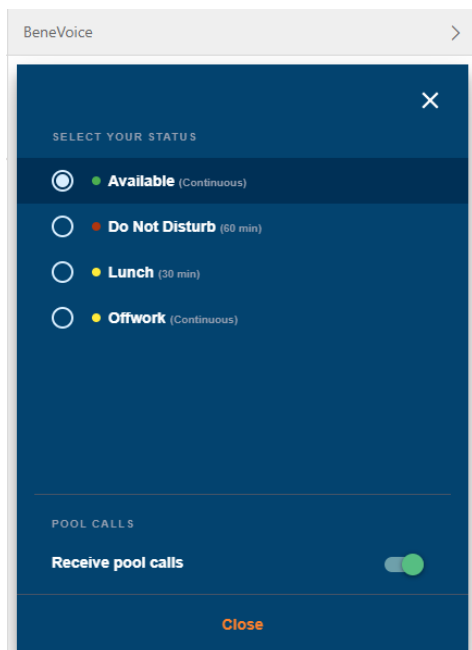
CIF version 2.0 (Omnichannel for Customer Service, Customer Service Workspace, Communication panel on the left side)

1.2.2 Availability Management

BeneCloud voice service typically includes customer specific availability statuses, but they always follow the status types described in this chapter. User controls available statuses via BeneVoice web phone. Depending on BeneCloud user role, user may additionally be able to control availability on different voice channel service pools.

- Offwork
 - Not available to receive voice channel service pool calls
 - Available to receive direct calls (depending on user's call forwarding settings)
 - Able to make outbound phone calls
 - If Lunch option is selected, same functionality for 30 min.
- Available
 - Available to receive voice channel service pool calls
 - Available to receive direct calls (depending on user's call forwarding settings)
 - Able to make outbound phone calls
- DND

- Not available to receive voice channel service pool calls
- Not available to receive direct calls (depending on user's call forwarding settings)
- Able to make outbound phone calls



1.3 BeneVoice Web Phone

Web browser based softphone supported in Chrome browser.

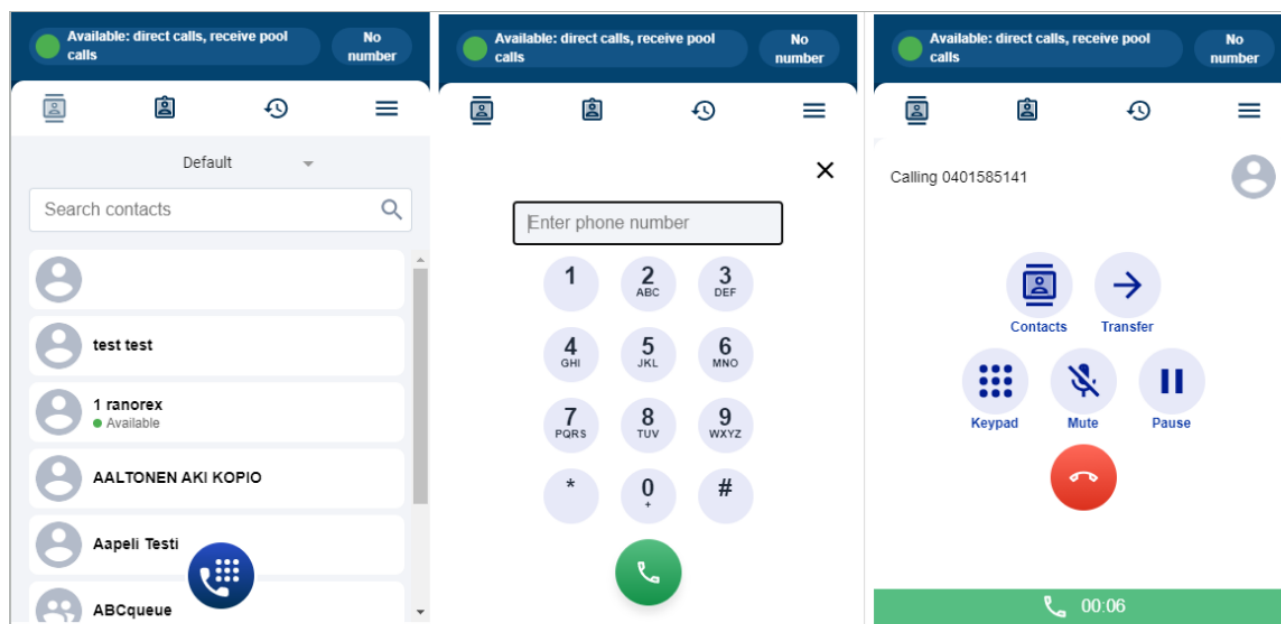
General functionality:

- BeneVoice web phone is based on WebRTC technology
- Make phone calls via web phone contact directory, keypad or call history
- Make phone calls via Dynamics 365 view (click-to-dial)
- Answer, end and decline phone calls
- Selecting caller number for outbound phone calls
- Mute / Unmute microphone
- Hold / Unhold phone call
- Call transfer (direct transfer and consulted transfer)

- DTMF by keypad (ordinary telephone's touch keys available)
- Caller identification from web phone contact directory and voice channel service pool queue name with receiving phone calls
- Availability status management
- Managing availability in voice channel service pool queues
- Voice channel service pool queue details dashboard
- Call history
- Additional user settings are managed via BeneDesk web and BeneApp mobile ui's

More detailed instructions via separate BeneVoice web phone user guide.

See [Link](#) to Benemen Wiki-page.



2 Phone Workflows

Choice of different phone workflows, which determine the action with inbound and outbound phone calls. Phone workflow is configured by Benemen.

- Phone Call activity: Automated Phone Call activity creation for identified Contact / number
- CaseDialog: New & Existing Case handling with contact dialog. Targeted for contact identification and case handling.
- Contact&Account: Contact & Account identification and screen pop-up.

2.1 Phonenumber Activity – Phone Workflow

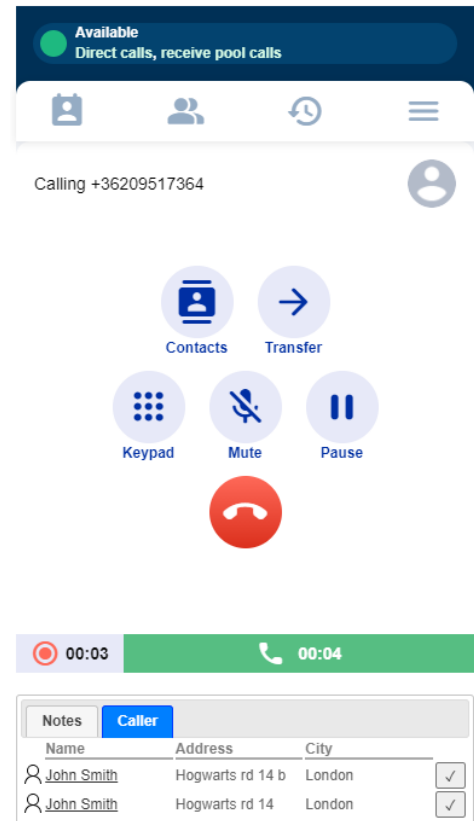
2.1.1 Inbound call – Single identified customer

1. Phone call rings on web phone
 - a. BeneVoice pane is forced to the maximized mode
 - b. Contact card is opened in the main area
 - i. If there is unsaved record on the agent's table – no action will be taken.
Contact card will be opened when user answers the call
2. If user answers the call, then call notes area appears in the BeneVoice pane and it can be used for writing notes during the call.
 - a. Contact card will be shown if it was not done in step 1.b
 - b. When call is ended, a new Phone call activity is automatically created (description field will contain phone call notes)
 - c. Advanced call details (link to call recording) automatically updated in 20-40 seconds after creation
3. If user declines the call, no action is taken
4. When close button is pressed in web phone, BeneVoice pane is forced to the minimized mode

2.1.2 Inbound Call – Not identified / Multiple identified customers

1. Phone call rings on web phone
 - a. BeneVoice pane is forced to the maximized mode
 - b. If there is unsaved record on the agent's table – no action will be taken.
Otherwise, contact card will be opened when call rings
2. If user answers the call, then call notes area appears in the BeneVoice pane

- a. If multiple customers (contacts or accounts) were found by the search, results are shown right below BeneVoice phone control, within *Caller* sub-tab. User can open the records by clicking on name. To pick one of the callers, the check mark next to the desired caller must be clicked.
 - b. When call is ended, new Phone call activity is automatically created. Call From and Regarding attributes are filled if either
 - i. there was a single identified customer or
 - ii. multiple customers were found, but the agent picked one of those
 - c. Advanced call details (link to call recording) automatically updated in 20-40 seconds after phone call activity is created
3. If user declines the call, no action is taken
 4. When close button is pressed in web phone, BeneVoice pane is forced to the minimized mode



2.1.3 Outbound call - Single identified customer

1. Phone field configured for Click to dial in D365 is clicked
2. Phone call rings on web phone
 - a. BeneVoice pane is forced to the maximized mode
3. No action is taken
4. If customer answers the call, then call notes area appeared in the BeneVoice pane
 - a. When call ended, new Phone call activity is automatically created (description field will contain phone call notes)
 - b. Advanced call details (link to call recording) automatically updated in 20-40 seconds after creation
5. If user declines the call, no action is taken
6. When close button is pressed in web phone, BeneVoice pane is forced to the minimized mode

2.1.4 Outbound call – Not identified / Multiple identified customers

1. Phone field configured for Click to dial in D365 is clicked
2. Phone call rings on web phone
 - a. BeneVoice pane is forced to the maximized mode
3. No action is taken
4. If customer answers the call, then call notes area appears in the BeneVoice pane
 - a. When call is ended, new Phone call activity is automatically created. Call To and Regarding attributes will be empty
 - b. Advanced call details (link to call recording) automatically updated in 20-40 seconds after creation
5. If user declines the call, no action is taken
6. When close button is pressed in web phone, BeneVoice pane is forced to the minimized mode

3 Phonecall Activities and Details in Dynamics 365

By default, call details are automatically saved as phone call activity in D365 for all answered calls handled via web phone integration for single identified customers. This occurs when the phone call ends. If customer was not identified or multiple occurrence exists – phone call form with pre-populated values will be shown when call is ended and needs to be completed and saved by agent.

Following fields are populated:

- Regarding*
- Description – is taken from the notes area in BeneVoice pane
- Call From*
- Call To*
- Phone Number
- Direction
- Actual Start
- Actual End
- Duration
- Call Recording** – URL will be automatically updated in 20-40 seconds after creation.

* - Will be filled in only for the identified customer

** - If the phone call activity completed before this time, the link will not appear.

4 PhoneCall Synchronization in BeneVoice for Dynamics 365 (Enterprise Calls)

Enables phone call activity creation in D365, which were not already done and created by BeneVoice for D365 embedded webphone. Main use case is customer calls answered/made in another BeneCloud voice endpoint e.g. Mobile and BeneVoice for Teams phone calls.

Phone Call activity creation happens automatically for Dynamics 365 users that have Benemen email address and id set in BeneVoice Configurator. When user calls or receives a call to/from a user that is listed as a contact in Dynamics 365 the Call data is imported to Dynamics 365.

Configuration is described in separate BeneVoice for Dynamics 365- Configuration guide for admins.

5 Callbacks

BeneVoice for Dynamics 365 includes option to integrate BeneCloud callback functionality with Dynamics 365. With this integration callback logic and service are implemented as standard service module at BeneCloud side, but callback requests are fully handled in D365.

- Integration can be activated on BeneCloud callback list per D365 queue basis. Configuration is described in separate BeneVoice for D365 - Configuration guide for admins.
- As soon as customer leaves callback on BeneCloud side, information is fetched to D365 and created as D365 Phone Call.
- Timespan is configurable and 15 min by default.
- All callback request handling is thereafter happening at D365 side. (As soon as callback request is successfully created on D365 side, it is automatically closed on BeneCloud side with "Handled by D365" note.)
- Callback phone calls are assigned to configured Dynamics 365 queues.
- Contact/Account/Lead identification is done based on caller's phone number.
 - If single Contact/Account/Lead is identified, then Phone Call activity is created for this record.
 - If multiple or none Contact/Account/Lead is identified, then Phone Call activity is created without Regarding and From attributes.
- Callback Phone Call activity subject is: "Callback Request"

- Standard BeneVoice functionality brings added value for callback handling as agents can use Click-to-dial for outbound calls from automatically created phone call activities.

6 Click-to-Dial

Click-to-Dial gives the possibility to make a phone call directly by clicking a button in D365 phone number fields.

Configured for the Click-to-Dial field will have a specific icon as shown below.



Click on the icon will initiate the outbound phone call according to processes described in chapter 2.1.3 for known customer and in 2.1.4 for unknown.

7 BeneCloud Management – general use cases

7.1 Voice Service Pool Management

Queue management can be handled flexible from different endpoints.

Management capabilities require BeneCloud Group Manager / Supervisor rights.

- BeneDesk web
<https://discover.benedesk.com>
- BeneApp iOS ja Android smart phones
<https://play.google.com/store/apps/details?id=com.benemen.beneapp&hl=en>
<https://apps.apple.com/fi/app/beneapp/id989797121?l=en>

7.1.1 BeneDesk Web

1. Login to <https://discover.benedesk.com> -> Service Pool Management
Service Pool Management view gives realtime snapshot of voice queues available for given agents and admins.

BeneDesk Set availability | salesforce demo1

Service pools

	Lock	Serving	Free	Active	Active calls	Queue length	Max. wait time
CS Japan	🔒	3	3	3	0	0	0s
CS South Korea	🔒	3	3	3	0	0	0s
CS Spain	🔒	2	2	2	0	0	0s
CS UK	🔒	2	2	2	0	0	0s
CS USA	🔒	3	3	3	0	0	0s
Customer Service EN	🔒	1	1	1	0	0	0s
Customer Service FI	🔒	1	1	1	0	0	0s
Customer Service SE	🔒	1	1	1	0	0	0s
Sales	🔒	0	0	0	0	1	7s

2. Click any queue you would like to see in more detail and do changes in real time.
 - a. Modify directly on this screen existing Agent details. Like activate in the queue, change skill level.
 - b. Use "Users" option to remove & add users in the queue
 - c. Use "Settings" to modify voice queue workflow.

Back to service pool list

Sales

Numbers ?
+3584578814276

Serving: 0 | Free: 0 | Active calls: 0 | Queue length: 1 | Max. wait time: 37s

Agent	Phone	Active	Queue length	Status
Salesforce Demo1		<input type="checkbox"/>	10	Available
Salesforce Demo2		<input type="checkbox"/>	5	Available
Salesforce Demo4		<input type="checkbox"/>	5	Available
Salesforce Demo5		<input type="checkbox"/>	5	Available
Salesforce Demo3		<input type="checkbox"/>	4	Available

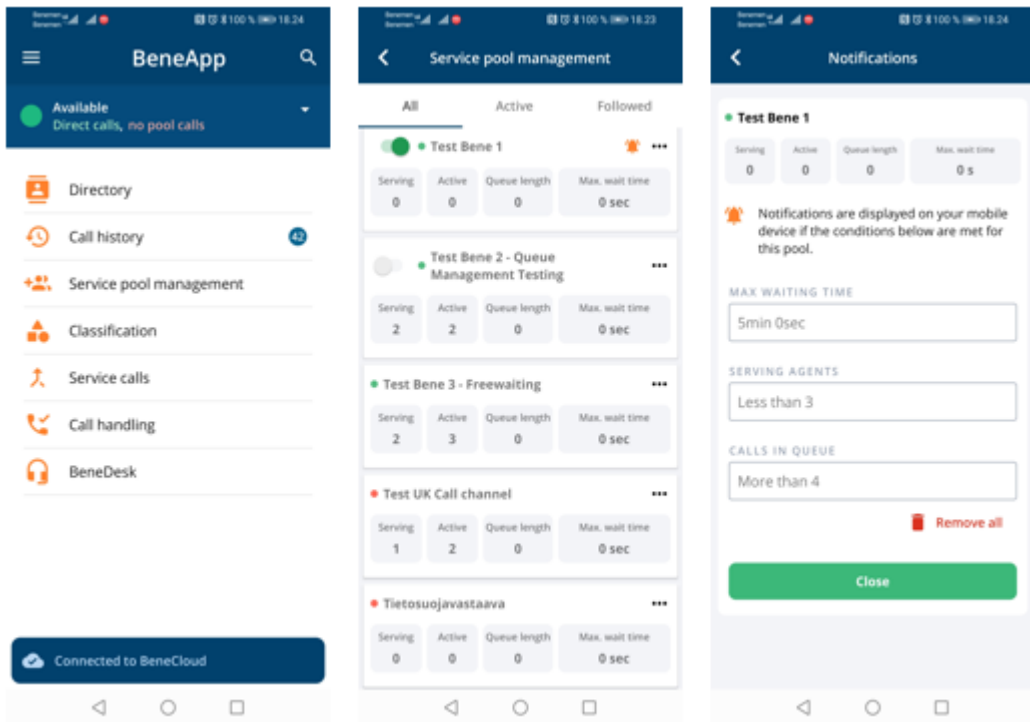
Save | Users | Settings

3. Settings view is used to manage and modify voice queue workflow
 - a. Modify queue announcements, transfers where the calls are connected with given option, schedules when queue is open / closed and exceptions
 - b. Supervisor can upload new announcements to the system via "Create new prompt" option
 - c. "Details" show more detailed information on the configured workflow. These are done and modified via Benemen support request

7.1.2 BeneApp in Mobile

BeneApp provides easy to use and feature rich BeneCloud voice channel management in Android and iOS smart phones. In addition to managing service pool voice queues, admin user may also set and control voice queue alarms and notification via mobile app. Possible notifications are delivered as push notification to the mobile device.

BeneApp brings many benefits for end users too. For example user can handle availability by couple of clicks, go available/offwork for voice channel and if needed handle service phone calls via mobile.



7.2 Reporting

7.2.1 Real Time Monitoring Dashboard

- Service pool voice queue real-time monitoring dashboard is available via BeneDesk Web <https://discover.benedesk.com> -> Service Pool Management. Selecting any queue will open more detailed view of the queue.

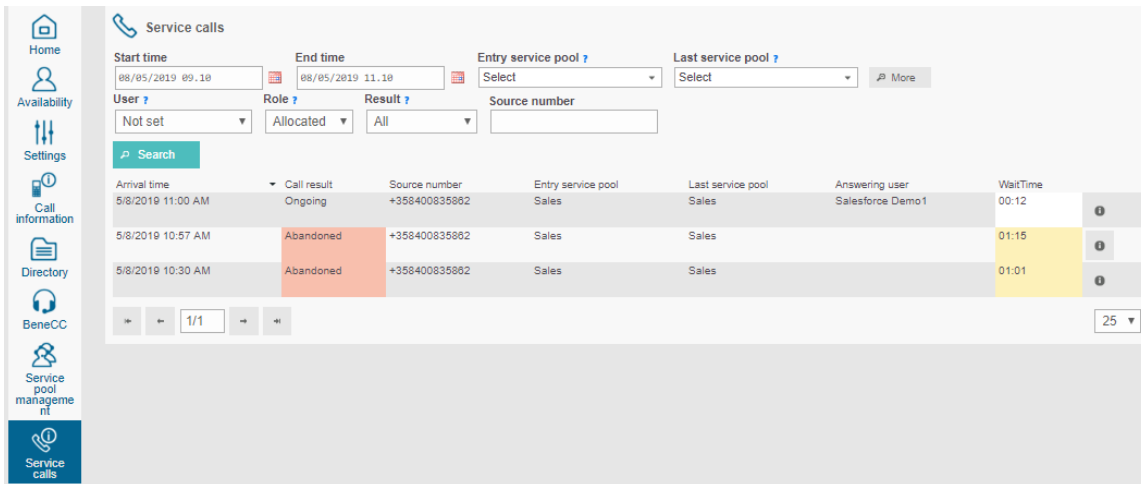
BeneDesk

Set availability | salesforce demo1

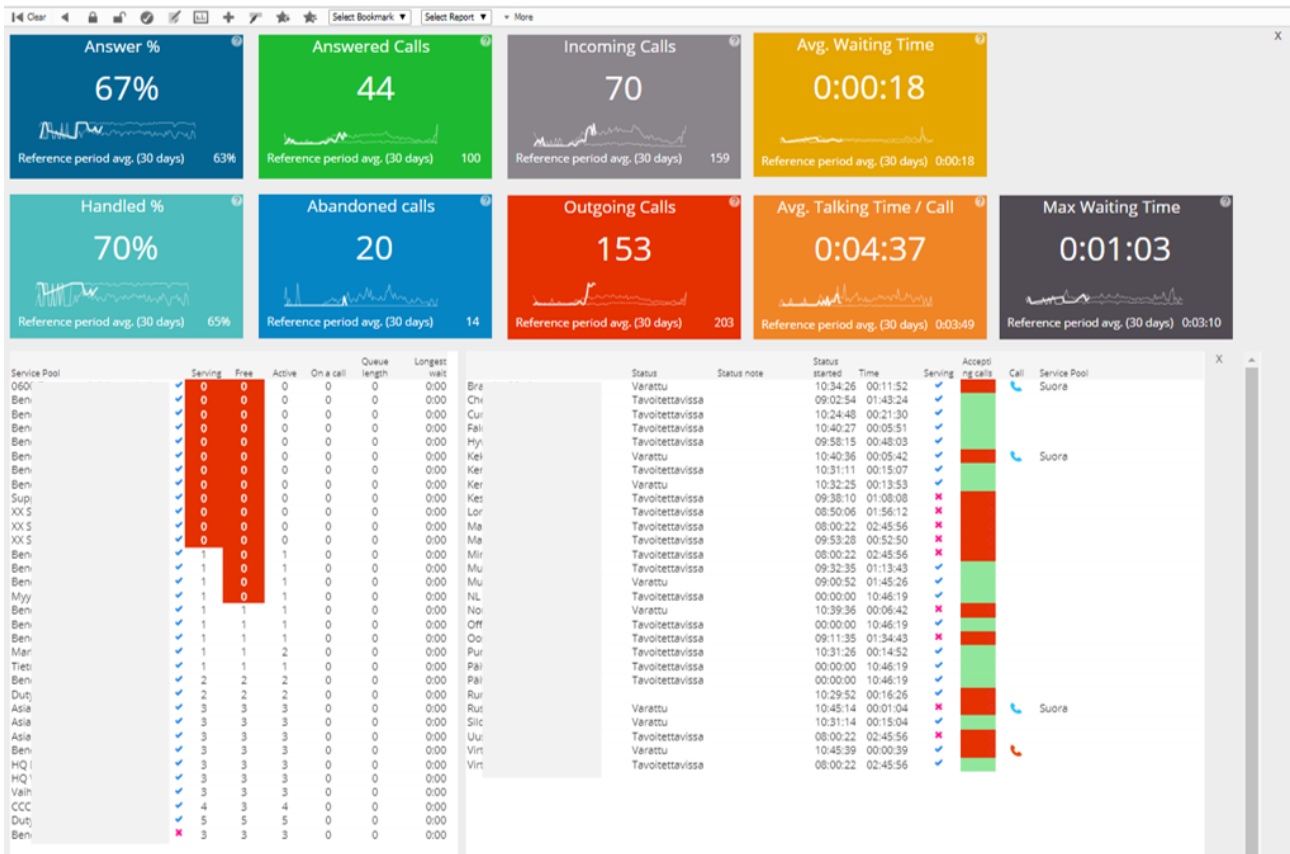
Service pools	Serving	Free	Active	Active calls	Queue length	Max. wait time
CS Japan	3	3	3	0	0	0s
CS South Korea	3	3	3	0	0	0s
CS Spain	2	2	2	0	0	0s
CS UK	2	2	2	0	0	0s
CS USA	3	3	3	0	0	0s
Customer Service EN	1	1	1	0	0	0s
Customer Service FI	1	1	1	0	0	0s
Customer Service SE	1	1	1	0	0	0s
Sales	0	0	0	0	1	7s



- Additionally Service calls tab can be used to see in more detail ongoing and recent service calls.



- More advanced real-time dashboards & info monitor views can be provided via BeneReports web reporting service and tool, if given service modules are purchased and configured for the customer. When configured, web based BeneReports tool can be accessed via BeneDesk web.

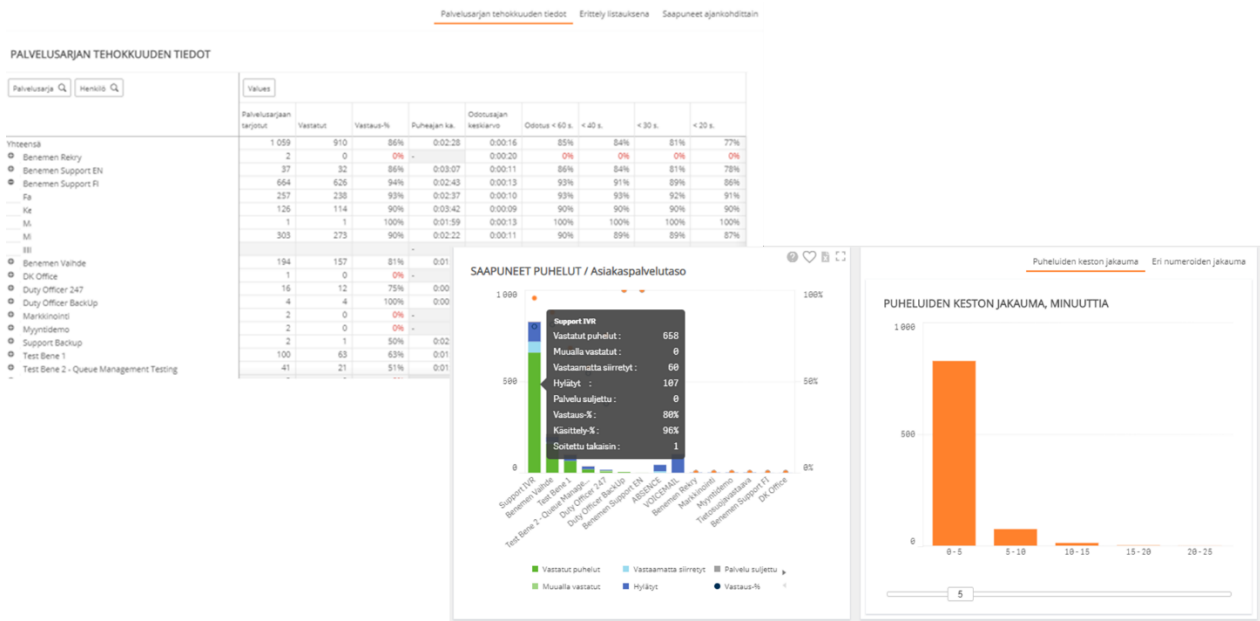


7.2.2 Reporting

Rich reporting capabilities can be provided via BeneReports online reporting service and Dynamics 365 reporting & dashboards modules.

BeneReports online reporting service

Provides detailed direct phone call, service call and call center reporting. When purchased and configured for the customer, web based reporting tool is accessed via BeneDesk web by users / admins with reporting manager rights.



Microsoft Dynamics 365 Dashboards and reports

Provides detailed reports for all the agent work and activities done via Microsoft Dynamics 365. All the saved phone call activities call details and phone originated case data are available for native Dynamics 365 report creation.