



BeneVoice for Dynamics 365 Configuration guide



BeneVoice for Dynamics 365 Configuration Guide



Contents

1 Microsoft Dynamics 365 tenant level configuration3
1.1 Installation Prerequisites4
1.1.1 Setting up Channel Integration Framework4
1.1.2 Provision Omnichannel7
1.2 Configure Azure app registration7
1.3 Install BeneVoice for Dynamics 365 package to Dynamics 365 Instance12
1.3.1 The installation process for the customer's administrator12
1.4 Configure application user in D36518
1.5 BeneVoice Configuration22
1.5.1 Channel Provider Configuration22
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 (CIF2)28
1.5.3 Phonecall sync settings29
1.5.4 Callbacks
1.5.5 Dynamics 365 apply Phone call form32
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.

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



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). <u>https://dynamics.microsoft.com/en-us/pricing/customer-service/#plans</u>
- 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
 - 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**

• 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-integrationframework/get-channel-integration-framework



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в	usiness Manageme	Customizations	So Administration	Email Config	iration 🛛 🛃	Organization Insights		Data Imports	Apps	
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¢¦þ 9	ync Error		Auditing	Sales Insights			Ŧ	Cases Invoiced		
9	Sites Create new sites or office	locations where service operations take	place. Add and remove resources, change	site information, or delete sit	es.					Subjects Manage the sub
2	Currencies Add new currencies or dru	ange the exchange rates for existing cur	erces.						%	Connection I Create, edit, and
3	Relationship Roles Manage the standard lace	els users can apply when they define rela	rfonship roles between accounts, contacts,	and opportunities.						Automatic F Create and man
Ъ	Rollup Queries Go to your list of Rolup C	Queries that you can use to gather data :	about a group of related records.						in	LinkedIn Sa Manage setting



Figure 1 AppSource Dynamics 365 Channel Integration Framework

Office 3



/licrosoft Dynamics 365	
Microsoft	
Microsoft Dynamics 365 Dynamics 365 Channel Integration Framework The Dynamics 365 Channel Integration Framework is a set of APIs (methods, events and protociol) that enables developers and partners to build immersive communication experiences such that third party communication widgets running on channel provider/partner cloud can interact with Dynamics 365, Enabling this solution, will allow you to configure the channel integrations in the Unified Interface apps for your users.	Add the application to Dynamics 365 Select the Dynamics 365 organization you want to add this application to. Connect to Dynamics 365 Organization to add the application to: Benemen Oy (org8c8zf5eb) Image: Agree to Microsoft's Legal Terms and Privacy Statement. Agree to Privacy Statement and Legal Terms for Importing solutions into Dynamics 365
Publisher: Microsoft Dynamics 365	
	Agree Cancel

Figure 2 Agree to Terms

Hicrosoft Dyn	amics 365					
Welcome						
INSTANCES UPDATES SERVI	CE HEALTH BACKU	JP & RESTORE APP	LICATIONS			
Manage vour solution	hc					
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Select a preferred s	solution to mana	age on selected in	stance: Benemen (Dv		
		5		,		
SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS			
Al Builder for SharePoint I	F 2020.7.16.3	1/1/2050	Not installed	Channel API Integr	at	
Anchor solution for Dual .	1.0.22	1/1/2050	Not installed			
Channel API Integration F	r 9.1.0.420	1/1/2050	Installation pending	Please wait while installation take a few minutes.	starts. This may	
Common Data Service Bas	s 9.2.2006.10	1/1/2050	Not installed	Bring your communication channel	els and build	
Common Data Service Sta	ar9.2.2006.10	1/1/2050	Not installed	immersive experience with Dynan	nics 365	
Contextual Help Base	1.0.0.12	1/1/2050	Installed	Created by: Microsoft	20	
Core Service Scheduling	9.0.20103.1007	1/1/2050	Not installed	Learn more	Ø	
Crm Hub	1.0.20170908.55	1/1/2050	Upgrade available			
Customer Service Team M	I 9.0.20094.3061	1/1/2050	Not installed			
Data Export Service for Dy	/ 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			
Id d b bl						

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/omnichannelprovision-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

	. > P Search resources, services, and docs (G+)/			5 6 4 9 9 9	patrik.vaskivuori@bene
Home > Benemen Oy					
Benemen Oy App	registrations 🖉				
≪ ● Overview ✓ Getting started ■ Preview hub	Hew registration ① Endpoints ② Troublechooting ± Download EE Prev Starting Jane 20th, 2020 w will no longer add any new leatures to Acure Active Directory, to be upgraded to Microsoft Authentication Liberry MSAU and Microsoft Graph. Learnin	iew features C Got feedback?	continue to provide technical support and security up	dates but we will no longer provide feature r	pdates. Applications will need $^{ imes}$
X Diagnose and solve problems Manage	All applications Owned applications				
💄 Users	P Start typing a name or Application ID to filter these results				
A Groups	Display name		Application (client) ID	Created on	Certificates & secrets
External Identities	M-Files reader			10/22/2018	
👃 Roles and administrators	Benemen Authenticator App			8/20/2019	
Administrative units					
Enterprise applications					
Devices					
App registrations	이번 두 가지 않는 것이 같아요.				
Application prov					
Licenses					
Azure AD Connect					
Custom domain names					
Mobility (MDM and MAM)					
Password reset					
Company branding					
③ 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:



- INICIOSOIT AZURE	A Statch resources' actives' and nota (0.4)				64 64	ч ∞
Home > Benemen Oy >						
🜉 BeneVoice 🖉						
P_Search (Ctri+/) ≪	Delete Endpoints Preview features					
😽 Overview	1 Got a second? We would love your feedback on Microsoft identity platform (previously A)	cure AD for developer).				
📣 Quickstart						
🛒 Integration assistant Preview	Display name : BeneVoice		Supported account types	: My organization only		
Manage	Application (client) ID:		Redirect URIs			
Branding	Directory (tenant) ID :		Application ID URI			
Authentication	Object ID :		Managed application in I			
📍 Certificates & secrets	Welcome to the new and improved Ann renistrations. Looking to learn how it's changed in the second secon	rom Ann renistrations (Lenacy)? Learn more				
Token configuration		in the contract of the contrac				
API permissions	1 Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory	Authentication Library (ADAL) and Azure AD Gra	ph. We will continue to provide t	technical support and security up	dates but we wi	ill no longer pr
Expose an API	need to be upgraded to Microsoft Authentication Library (MSAL) and Microsoft Graph.					
😼 Owners						
Roles and administrators Preview	Call APIs		Documentation			
🔟 Manifest						
Support + Troubleshooting	· 🗢 🚯 🕋 📲 🦉		Authentication scenarios Authentication libraries			
			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:



					a a a a a a a a a a a a a a a a a a a	
■ Microsoft Azure		P Search resources, services, and docs (G	5+N		D 🕼 🖓	@?© P
Home > Benemen Oy > BeneVoice				Request API permission	ns	
BeneVoice API per	missions 🖉					
Search (Ctrl+/) «	🕐 Refresh 🛇 Got feedback?			Microsoft APIs APIs my organization	n uses My APIs	
Sverview	Configured permissions			Commonly used Microsoft APIs		
4 Quickstart	Applications are authorized to call AP	Pls when they are granted permissions by users/ac	dmins as part of the consent process. Th	Microsoft Graph	andour amount of data in Office 265. Entermine	Mobility a Security and W
🚀 Integration assistant Preview	all the permissions the application ne	eeds. Learn more about permissions and consent		Access Azure AD, Excel, Intu	une, Outlook/Exchange, OneDrive, OneNote, Sha	rePoint, Planner, and more
Manage	🕂 Add a permission 🗹 Grant a	admin consent for Benemen Oy				
Branding	API / Permissions name	Type Description	Admin cor			
Authentication				Azure DevOps	🔗 Azure Key Vault	Azure Rights Ma
Certificates & secrets		Delegated Sign in and read user profile		Integrate with Azure DevOps and Azure	Manage your key vaults as well as the	Allow validated users to
iii Token configuration				DevOps server	Keys, secrets, and certificates within your Key Vaults	protected content
API permissions						
Expose an API				Arura Santica Management	Anna Storaga	Data Export Ser
Owners				Programmatic access to much of the	Secure, massively scalable object and	Microsoft Dynar Export data from Micros
Roles and administrators Preview				functionality available through the Azure portal	data lake storage for unstructured and semi-structured data	CRM organization to an destination
Manifest						
Support + Troubleshooting						
P Troubleshooting				Dynamics 365 Business Central	Dynamics CRM	Flow Service
New support request				Frogrammatic access to data and functionality in Dynamics 365 Business	software and ERP systems	Embed flow templates a
				Central		
				E Intune	Office 365 Management APIs	N OneNote
				Programmatic access to Intune data	Retrieve information about user, admin, system, and policy actions and events	Create and manage note files, and more in OneNe
					from Office 365 and Azure AD activity logs	
				Power BI Service	PowerApps Runtime Service	SharePoint

Figure 8 API permissions

• Tick user_impersonation selection and choose Add permissions

■ Microsoft Azure		P Search resources, services, and docs (G+/)			🗵 🕼 🕫 🍪 ? 😳 🏻 patrika
Home > BeneMoice API perr	missions &			Request API permissions	
Search (Ctrl+/) «	🖒 Refresh 🛇 Got feedback?			Dynamics CRM https://admin.services.crm.dynamics.com/ Docs of	
Sverview	Configured permissions			What type of permissions does your application require?	
4 Quickstart	Applications are authorized to call APIs	when they are granted permissions by users/admins as part of th	e consent process. Th	Delegated permissions	Application permissions
🥖 Integration assistant Preview	all the permissions the application need	 Learn more about permissions and consent 		Your application needs to access the API as the signed-in user.	Your application runs as a background service or signed-in user.
Manage	🕂 Add a permission 🗹 Grant adr	nin consent for Benemen Oy			
Branding	API / Permissions name	Type Description	Admin cor	Select permissions	
Authentication					
Certificates & secrets		Delegated Sign in and read user profile		Permission	Admin consent re
iii Token configuration				V Parmissions (1)	
API permissions					
📤 Expose an API				user_impersonation ③ Access Common Data Service as organization users	÷.
Owners					
Roles and administrators Preview					
Manifest				h	
Support + Troubleshooting					
Troubleshooting					
New support request					
linear				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.

← → C i portal.azure.com/#	lade/Microsoft_AAD_RegisteredAppsi/ApplicationMenu8lade/Credentials/quickStartType//sourceType/Microsoft_AAD_IAM/applid/33057387-1073-4198-9704-42e09fal1bad/objec	tld/93e610f3-ad24-420a-a93b-1706	*** 🗈 🖈 🥌 🛊 🕫 🕴
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Microsoft Azure	P Search resources, services, and docs (G+/)	L & 🖓 🎯 1	patrik.vaskivuori@bene вкламно оч
Home > Benemen Cy > BeneVoice	ates & secrets 🤌		
	♡ Got feedback?		
Sverview	Add a client secret		
4 Quickstart			
💋 Integration assistant Preview			
Manage			
Eranding	(e) in 1 year		
authentication	○ ni z youts ○ Never		
Certificates & secrets Token configuration	Add Cancel		
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 diset secret		
Support + Troubleshooting	Description Expires Value		
Troubleshooting			
New support request	No client secrets have been created for this application.		

Figure 10 Add a client secret

Certificates						
Certificates can be used as secrets to	prove the application's identit	y when requesting a toke	en. Also can be referred to	o as public k	iys.	
T Upload certificate						
Thumbprint		Start date	Expires	ID		
No certificates have been added for	this application.					
Client secrets						
A secret string that the application u	ses to prove its identity when r	equesting a token. Also c	an be referred to as appl	ication passv	vord.	
+ New client secret						
Description	Expires	Value	Сор	ied		
BeneVoice	1/15/2022	9727ceQ6ykdt60x	cNJnt2c_YWhe_JE38	fd sfa	6-fe6b-4bf7-87de-5870d658189c	0



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).



elleral Sec	urity Details Previous	s Versions			
0.	DeploymentPackage.	dll			
Type offile:	Application extension ((.dll)			
Opens with:	Unknown application	Unknown application Change			
Location:	C:\Dev Install\Deploym	nentPackage (5)\Deployme	ntPa		
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	fidden Advance	ed		
Security:	This file came from and and might be blocked t this computer.	other compute to help protec	ĸ		

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.



A Package 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

benemen

Package Deployer for M Connect to Micr	icrosoft Dynamics CRM 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 avail	able organizations								

Figure 14 Insert your company information



- 🗆 🗙

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Mackage Deployer for Microsoft Dynamics CRM

Connect to	Microsoft [Dynamics	CRM
------------	-------------	-----------------	-----

Deploym	ent Type:	On-premises Office 365									
Sigr	Sign in as current user										
✓ Disp	Display list of available organizations										
Show Advanced											
Advanced											
Online R	egion	Europe, Middle East and Africa	\sim								
User Name		your.email@company.com									
Passwor	d	•••••									

Login

Figure 15 Company information example

g		
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



Magnetopice Customizations Setup for Microsoft Dynamics CRM

_

Welcome to the BeneVoice Customizations Setup Tool

BeneVoice Customizations and Settings

Bene Voice for D365 Package	_	
Dans Vision Cattings calution will be installed		
- Channel Provider will be created	_	
- Bene Settings will be updated	_	
Click Next to Continue	_	

Figure 17 BeneVoice for D365 Package

BeneVoice Customizations Setup for Microsoft Dynamics CRM	-		×
Ready to Install			
Solution Package : BeneVoice Customizations			
Organization : org			
To make changes, click Previous. To install the solution package, click Next.			
Previous		Next	

Figure 18 Ready to Install



Manual BeneVoice Customizations Setup for Microsoft Dynamics CRM

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_

Reading BeneVoice Customizations Installer Configuration

Status: Ready

Organization : org

View log file

Ø	Import configuration loaded.	^								
0	Found 1 solutions.									
Ø	Found the solution: Bene Voice Customizations, version: 1.0.3.2 (Managed)									
Ø	2. Dependency Found ChannelAPIIntegrationFramework									
Ø	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									
Ø	7. Dependency Found : Dependency on solution msdynce_Customerservicehub found on target environment	~								
	Previous Next									

101. at alla

FIg	ure	I'S INSTAILER CONTIGUTATION											
4	BeneV	oice Customizations Setup for Microsoft Dynamics CRM	_		\times								
	Exec Status:	uting Install Actions BeneVoice Customizations and Settings Unpacked											
	Organization : org												
	0	Loaded the solution Bene Voice Customizations, version: 1.0.3.2.											
	۲	Pre-import process complete.											
	ø	Post-import process complete.											

View log file

Previous

Next

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)**



\rightarrow	G	le benem	nen.crm4	4.dynamics.com	n/main	.aspx?setting	sonly=true	#40273	33200									
			~	Settings	~	Security											Q	3
1EM	≗ ↑	PROMOTE TO	ADMIN	🖘 EMAIL A LI	NК∣⊸	, ⊿∕ ^a FLOW	₹ <mark>₀</mark> ∕ [□] FLC	- W	🖹 RUN I	REPORT 🔻	EXCEL TEMPL	ATES 🔻	SEXPORT TO EXCEL	• i	🖡 IMPORT DATA	Ŧ	•••	
-12 /	٩р	plicatior	n Use	rs ¥												Sear	ch for	records
	I	Full Name	\uparrow			Ap	lication I	Azure	e AD Obj	Applicatio	on I							
		Business Ap	oplication	n Platform Servio	e acco	unt 475	226c6-02	1df41	108e-4f4	https://se	rvic							
		Microsoft F	orms Pro)		190	d5b37-d1	2ac20)c21-e1	19dd5b37	7-d1							
		Power Apps	s Checke	r Application		c92	99480-c1	cec46	5591-78	https://te	st.a							
		RI AppUser				dc4	31514-d1	e661a	af1b-789	https://cri	mri							
		Super Cards	s			e61	d067b-25	c19a0	0717-70	e61d067b	o-25							
		VOC Push S	Service			190	49fe8-933	6aca5	5b3c-a9	https://cri	ms2							

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.



		G		~	Set	tings	~	Security I	lew l
5	AVE	🛱 SAVE &	CLOSE	₀⁄ ⁰ F	low -	₀⁄ª F	low -	E FORM	EDITOR
	0	Nev	r:app wUs	er *	ION USE	R *			
3	The i	nformation	provideo	d in this	s form is v	iewable	by the	entire organiz	ation.
	⊿ Sui	mmary							
	Acc	ount Infor	mation						
	User	r Name *		b	enevoice	e@ben	emen.	com	
	App	lication ID	-	3					
	App	lication ID	URI	⋒ ···					
	Azu	re AD Obje	ect ID *						
	Use	r Informat	ion						
	Full	Name *		В	ene Voic	e			
	Prim	nary Email	•	b	enevoic	e@ber	nemen.	.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.

:12



	-			
· 📖 🏠 -	Settings 🗸	Security	Bene Voice	>
S CONNECT 👻 💼 DELETE	📱 PROCESS 👻 💐 A	PPROVE EMAIL	L 💐 REJECT	FEMAIL
USER : APPLIC	ation user ▼ e ™≡			
The information provided in	this form is viewable by the	entire organiz	ation.	
Summary			_	
Account Information				
User Name *	benevoice@benemen	.com		
Application ID *	3			
Application ID URI	33			
Azure AD Object ID * 📲	dc2			
User Information				
Full Name *	Bene Voice			
Primary Email *	benevoice@benemen	1.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?

Role Name	Business Unit	
App Profile User	Benemen Dev	
Basic User	Benemen Dev	
Benemen Basic	Benemen Dev	
🗹 BeneVoice ApiUser	Benemen Dev	
BeneVoice User	Benemen Dev	
BizQAApp	Benemen Dev	
Bot Author	Benemen Dev	
Bot Contributor	Benemen Dev	-



×

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:



/	Apps						e ×
Hom Rece	Search my apps				+ Create new App	🖔 Refresh	Ŷ Filter
Pinne	- Published Apps (25)						
ort Case	Þ	7			.		
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	and build immersive experience with	Default Publisher for benemen 19.1.2019	Productivity tools Microsoft Dynamics 365	Default Publisher for benemen 17.2.2019	App for Outlook for enabled users. Default Publisher for benemen 27.8.2018		
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	Dynamics 365 Portals	IT Support	Numsi	 Operator Info	Portal		

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



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		API Ve	ersion Id Domain m Parameters	1.0 htt) ps://app-ben	n-webp 🕀												

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-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 CIF2, follow the guide

https://docs.microsoft.com/en-us/dynamics365/customer-service/channel-integrationframework/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="" 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





Figure 29 BeneVoice Configurator App

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

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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.

Ben	e Users ∨					√ Quick find
~	Full Name ↑ ∨	Business Unit \smallsetminus	Title \checkmark	Main Phone \checkmark	Benemen User Id \checkmark	Only Queue Calls 🗸
		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	
63		benemen			07445c45-5d56-e211	
		benemen			b9297cca-4b17-ea11	No
		benemen				
		benemen				
		benemen			b23779a4-6c02-e711	
		benemen			60f65e35-162c-e811	
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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:



	BeneVo	bice Configu	urator							م
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Figure 32 User record BeneVoice settings

- o 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 (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.



BeneVoice

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

General Related		
Users		Add Existing User :
	Site \checkmark	Business Unit \checkmark Title \checkmark
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1.5.3 Phonecall sync settings

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

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-	<i>a</i>	CallStartMargin 15	
Cor	nfiguration	DefaultCrmAssignee	
公	General Settings	EnableAudit True	
×	Users Settings	EnableMultipleMatchCreate True	
Cal	lbacks	ExecutionInterval 120	
公	Callback Profiles	IncomingDirectCallSubject Incoming direct call	
公	Bene Callback Lists	IncomingQueueCallSubject Incoming queue call	
Ľ	Queues	MultipleMatchPhoneCallStatus 1	
Sm	art Routing	NumbersToCut 3	
公	Bene Queues	OutgoingDirectCallSubject Outgoing direct call	
Cha	annels	ProcessDirectCalls False	
ж	Channel Providers	ProcessServiceCalls True	
		ProcessServiceCallsUnanswered True	
		RuninDebugMode False	

Figure 33 Phonecall Sync Settings



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\Leftrightarrow	Bene Queues													
Cha	nnels													
×	Channel Providers													

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:



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Ē	Queues			Owner *	2 Q Dynamics Administrator
Sma	art Routing				
公	Bene Queues				
Cha	nnels				
Х	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)

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Support		
Support		y / l
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									- 0	×
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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

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Form: Contact - Google Chrome					- C) ×
benemen.crm4.dynamics.com/	main.aspx?pagetype=formeditor≈	pSolutionId=%7b9FA5955C-	533D-E811-A9	54-000D3A206	976%7d&etc=2&extraqs	=form
Power Apps					1	
FILE HOME INSERT	Field Properties Modify this field's properties.			? X		Ø
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Figure 38 Channel Communication Control

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

7.10.2021



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)