



# 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 logins as normal to Microsoft Dynamics 365 web user interface

2) User opens any Dynamics 365 app, where also BeneVoice for Dynamics 365 is activated.

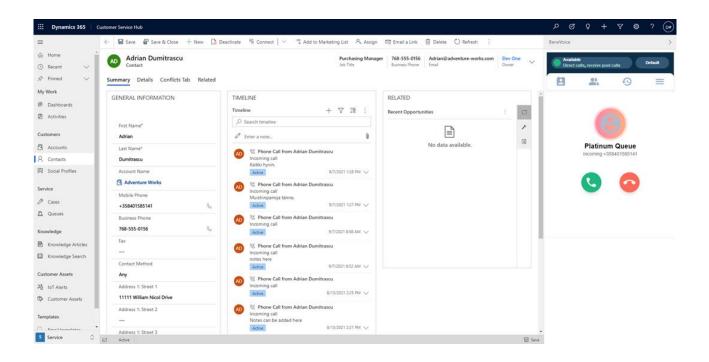


3) BeneVoice web phone panel is visible on the right side of Dynamics 365 App UI (without Omnichannel) or on the left side of the App UI (Omnichannel use). Benevoice for Dynamics 365 will log in automatically. Please allow the microphone use / access by the Chrome browser.

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.



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

	BeneVoice	R Contacts My Active S My Active Accounts	R Active Contacts % My Phone Calls R Dynamics 365	× +
) Home		🗧 🖬 Save 🎒 Save & Close 🕂 New 🖸	Deactivate 🦓 Connect   🗸 🖷 Add to Marketing List 🤗 Assign	
BeneVoice	Available Direct Calls, receive part calls	Adrian Dumitrascu	Caller Adrian Dumitrascu ger 768-555-0156 Adriar Wait time 116 sec	
		Summary Details Conflicts Tab Related		Accept Reject
		GENERAL INFORMATION	TIMELINE	RELATED
	Please answer or reject the call on the notification		Timeline + ♥ III :	Recent Opportunities
		First Name*	P Search timeline	P /
	Platinum Queue	Adrian	C Enter a note	No data available.
		Last Name* Dumitrascu	S Phone Call from Adrian Dumitrascu Incoming call Kaikki hyvin.	NO Gata available.
		Account Name	Active 9/7/2021 1/28 PM V	
		Adventure Works	Phone Call from Adrian Dumitrascu     Incoming call	
		Mobile Phone	Muistiinpanoja tänne.	
		+358401585141	Active 9/7/2021 1:27 PM V	
		Business Phone 768-555-0156	Se Phone Call from Adrian Dumitrascu Incoming call     Active     9/7/2021 858 AM	
		Fax.	O S Phone Call from Adrian Dumitrascu Incoming call	
		Contact Method	notes here Active 9/7/2021 8-52 AM 🗸	
		Address 1: Street 1	Phone Call from Adrian Dumitrascu Incoming call	
		11111 William Nicol Drive	Active 0/13/2021 2:25 PM V	
		Address 1: Street 2	K     Phone Call from Adrian Dumitrascu Incoming call Notes can be added here	

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

### 1.2.1 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 statutes 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

BeneVoice	>
SELECT YOUR STATUS	
Available (Continuous)	
Do Not Disturb (60 min)	
• Lunch (30 min)	
• Offwork (Continuous)	
POOL CALLS	
Receive pool calls	
Close	

### **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

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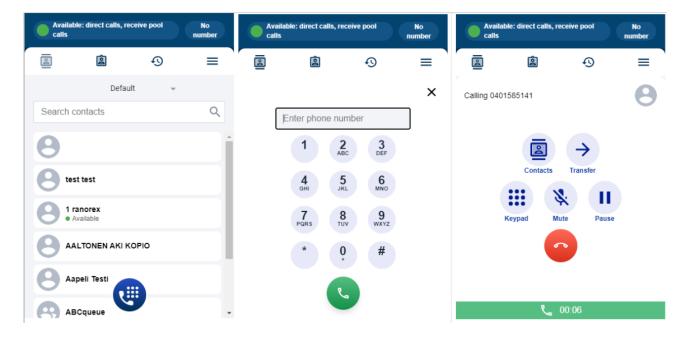
- Call transfer (direct transfer and consulted transfer)
- DTMF by keypad (ordinary telephone's touch keys available)

• 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

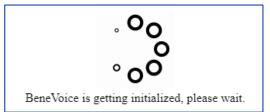
More detailed instructions via separate BeneVoice web phone user guide.

See Link to Benemen Wiki-page.



### 1.4 Single-session Web Phone (CIF1)

When the phone is used in CIF1 solution (phone is located on the right side of the window), the phone can be loaded and initialized in one, so-called *primary session* only. Initialization and conflict check (so that any other instances of the phone under same user



context is not in use anywhere else) takes some time. During this process you will see a progress indicator.

After initialization and conflict check is ready, phone user interface becomes visible, calls can be made and received.

If phone is already in use in another window or browser tab under the context of same user, a message is displayed after initialization. If the phone works properly in the primary window, this message can be ignored.

### 2. Phone Workflows

Webphone is already active in another window

#### <u>See less</u>

Webphone is already active in another Tab or Window. Web Phone can be active in singlesession only. If you want to activate the phone here, please close all other Windows and Tabs and reload the page after a few seconds.

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 Phonecall Activity – Phone Workflow

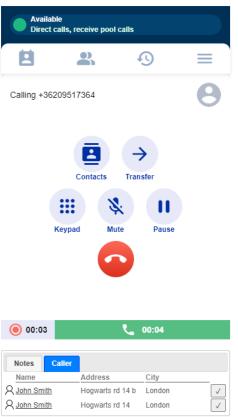
- 2.1.1 Inbound call Single identified customer
- 1. Phone call rings on web phone
  - a. BeneVoice pane is forced to the maximized mode
  - b. Contact card is opened in the main area



- 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.
  - 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 occurrences 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.
- Call Arrived At\*\*\*
- First Answered At\*\*\*
- Wait time (until first answer) \*\*\*
- \* Will be filled in only for the identified customer
- \*\* If the phone call activity completed before this time, the link will not appear.
- \*\*\* Populated when there is an incoming call from a call queue / pool.

## 3.1. Call Metrics

If the agent received an incoming call from a pool (queue), shortly after ending the call (in 20-30 seconds) the following fields get populated:

- **Call Arrived at**: The date and time when the call reached Benemen's infrastructure and entered a queue
- **First Answered At**: The date and time the call was answered by a human agent for the first time
- **Wait Time (until first answer)**: The time spent (in seconds) in the queue, waiting to be answered by an agent

The fields are visible on the form only when have any value.



# 4. PhoneCall Syncronization 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.

Mobile Phone	
+358 55 5555 555	S

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

### 2.2 Voice Service Pool Management

Queue management can be handled flexible from different endpoints.

Management capabilities require BeneCloud Group Manager / Supervisor rights.

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

### 2.3 BeneDesk Web

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



eneD	esk						• Set availability 👤 sa	esforce.demo1
	Service pools							2
2		8	A Serving	Free	Active	🛱 Active calls	A Queue length	Max. wait time
3	C S Japan		3	3	3	0	0	0s
ability	CS South Korea		3	3	3	0	0	0s
ł	CS Spain		2	2	2	0	0	0s
ings	CSUK		2	2	2	0	0	0s
D	CSUSA		3	3	3	0	0	0s
all nation	Customer Service EN		1	1	1	0	0	0s
	Customer Service FI		1	1	1	0	0	0s
ctory	Customer Service SE		1	1	1	0	0	0s
	Sales	•	0	0	0	0	1	7s
) •CC								
8								

- 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.

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ion 📃	Salesforce Demo1			10	×	Available				
	Salesforce Demo2			5	×	Available				
y 📃	Salesforce Demo4			5	*	Available				
	Salesforce Demo5			5	×	Available				
	Salesforce Demo3				×	Available				
	Save 🖋 Users 🛛 6 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



fi-FI Europe/Helsin	ki					
<ul> <li>Basic behaviour</li> </ul>	🔒 In Use	Announcement	CP Transfer		Schedule	
Service open		Default_InQueue	Ŧ		Always Open	٣
Service closed		Default_ServiceClosed	▼ Not set	Ŧ		
Pre Welcome Prompt		Not set	¥			
Play Once Prompt		Once_Demo_long_Fi	¥			
Default overflow		Default_QueueFull	Call Back Request	•		
No available agents		Not set	Call Back Request	•		
Exceptions						
Ad hoc 1	No Yes	Not set	• Not set	٣	Not set	٣
Ad hoc 2	No Yes	Not set	• Not set	•	Not set	•
Ad hoc 3	No Yes	Not set	• Not set	*	Not set	Ŧ
Exceptions when	closed					
Ad hoc 1		Not set	• Not set	Ŧ	Not set	٣
Ad hoc 2		Not set	• Not set	۳	Not set	٣
Ad hoc 3		Not set	<ul> <li>Not set</li> </ul>	Ŧ	Not set	Ŧ

### 8. 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 notifiations 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.



	A A B B B 8100 % I	RD 18.24	-	4 4 0	81	\$ \$100 % IND 18.23	terra a	•	B (7 8 100 % IND 18.2
=	BeneApp	۹	<	Service	e pool manag	ement	<	Notificat	ions
	ailable rect calls, no pool calls	-	All		Active	Followed	• Test Bene	1	
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9	Call history	•		Test Be	ne 2 - Queue		this po		s below are met for
	Service pool management				ement Testing				
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			Serving	Action	Queue length	Max, wait time	Less than	13	
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2	BeneDesk						CALLS IN C	UEUE	
	Deliebesk		• Test U	K Call ch	annel		More that	in 4	
			Serving	Active	Queue length	Max. wait time			Remove all
			1	2	0	0 sec			
								Close	
			<ul> <li>Tietos</li> </ul>	uojavast	aava				
			Serving		Queue length	Max. wait time			
• Co	onnected to BeneCloud		0	0	0	0 sec			
				<	0			d 0	

## 9. Reporting

### 2.4 Real Time Monitoring Dashboard

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

BeneD	esk						<ul> <li>Set availability</li> <li>sat</li> </ul>	esforce.demo1
Home	Service pools							2
0		8	<u>A</u> Serving	Free	Active	Active calls	<u> </u>	Max. wait time
8	C S Japan		3	3	3	0	0	0s
Availability	CS South Korea		3	3	3	0	0	0s
t#	CS Spain	•	2	2	2	0	0	0s
Settings	CSUK		2	2	2	0	0	0s
0	C S U SA		3	3	3	0	0	0s
Call	Customer Service EN		1	1	1	0	0	0s
	Customer Service FI	•	1	1	1	0	0	0s
Directory	Customer Service SE		1	1	1	0	0	0s
	Sales	•	0	0	0	0	1	7s
BeneCC								
_								
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ervice pool anagement								



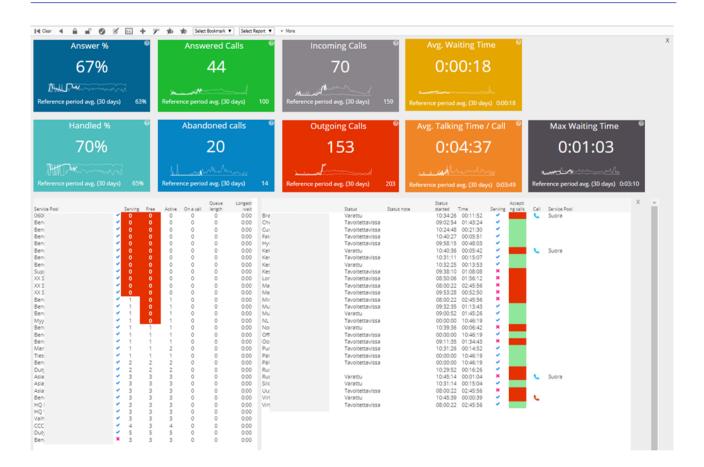
) F Ba	ck to service pool list											
8	🔀 Sales											
	Numbers ?											
+358	+3584578814276 Serving $f_{rec}$ Active calls Queue length Max. wait time Active calls Queue length Max. wait time $Active calls Queue length Max. and time Active call Active calls Queue length Max. and time Active call Active call Active calls Queue length Max. and time Active call Active$											
<b>)</b>	Å	S	$\odot$	\$	8	8						
ition	Salesforce Demo1			10	×	Available						
	Salesforce Demo2			5	×	Available						
ory 📕	Salesforce Demo4			5	×	Available						
	Salesforce Demo5			5	×	Available						
	Salesforce Demo3				×	Available						
s 🗸 s	ave 🖌 Users 🛛 6 Settings											

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

	Service calls						
Home	Start time	End time	Entry service pool ?	Last service pool ?			
8	08/05/2019 09.10	08/05/2019 11.10	Select +	Select	▼ 🖉 More		
Availability	User ?	Role ? Result ?	Source number				
t#	Not set 🔻	Allocated <b>v</b> All	•				
Settings	P Search						
0	Arrival time	Call result     Source number	Entry service pool	Last service pool	Answering user	WaitTime	
Call	5/8/2019 11:00 AM	Ongoing +35840083586	2 Sales	Sales	Salesforce Demo1	00:12	0
	5/8/2019 10:57 AM	Abandoned +35840083586	2 Sales	Sales			0
Directory	5/8/2019 10:30 AM	Abandoned +35840083588	2 Sales	Sales		01:01	0
BeneCC	r ← <u>1/1</u> →	+1					25 🔻
Service pool manageme nt							
nt							

 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.





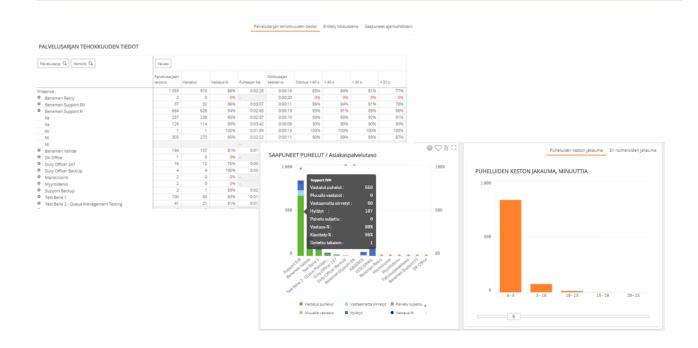
### 2.5 Reporting

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.