Voice for Dynamics 365 by Enreach V 1.4





# Voice for Dynamics 365 Configuration Guide



# Contents

1 Microsoft Dynamics 365 tenant level configuration	3
1.1 Installation Prerequisites	4
1.1.1 Setting up Channel Integration Framework	4
1.1.2 Provision Omnichannel	7
1.2 Configure Azure app registration	7
1.3 Install Voice for Dynamics 365 package to Dynamics 365 Instance	12
1.3.1 The installation process for the customer's administrator	12
1.4 Configure application user in D365	17
1.5 Voice for D365 Configuration	18
1.5.1 Channel Provider Configuration	18
1.5.1.1 Configuration for Channel Integration Framework 1.0	18
1.5.1.2 Configuration for Channel Integration Framework 2.0	20
1.5.2 Users	21
1.5.2.1 Update enreach Cloud User ID	21
1.5.2.2 Assign users to Application Profile (CIF2)	23
1.5.3 Phonecall sync settings (Enterprise Calls)	23
1.5.4 Callbacks	27
1.5.4.1 Basic configuration	27
1.5.4.1 Synchronization methods	29
Setting up polling sync	30
Setting up webhook sync	30
1.5.5 Dynamics 365 apply Phone call form	
1.5.6 Dynamics 365 Click-to-Dial configuration	32
1.6. Smart Routing in Voice for Dynamics 365	
1.6.1 Receiving data	
1.6.2 Authentication	
1.6.3 Redirecting the call	35
1.6.4 Useful links to technical documentation for Smart Routing scenarios	



1.7. Omnichannel user presence integration	36
1.8. Test Voice for Dynamics 365 functionality	37

# 1 Microsoft Dynamics 365 tenant level configuration

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

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

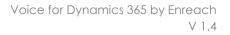
These are:

- 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 Voice 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 Enreach Cloud 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).
- 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 Enreach 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/channelintegration-framework/get-channel-integration-framework



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Business	Manageme	Customizations	So Administration	Email Config	ration 🖉	Organization Insights	Đ	Data Imports	Apps	
Template		II colored	Security	Activity Feed	Confi		÷	Targets	22 - 2	
Product 0	Catalog	Microsoft AppSource	Data Management	Activity Feed	Rules		÷	Vendors		
Service M	lanageme		System Jobs	Dynamics 36	App f		÷	Customer Care Mod		
Mobile O	ffline	Solutions History	Document Manage	Data Export			÷	Account domains		
Sync Erro	r		Auditing	Sales Insight			÷	Cases Invoiced		
Sites Create ry	ew sites or affice location	ors where service operations take	place. Add and remove resources, change	site information, or delete s	ŝ					Subjects Manage the subject
Curren Add new		he exchange rates for existing curr	ences.						5	Connection Rol Create, edit, and dev
	onship Roles the standard labels use	rs can apply when they define rela	Conship roles between accounts, contacts	, and opportunities.						Automatic Reco
	Queries our list of Rollup Querie	s that you can use to gather data a	socut a group of related records.						in	LinkedIn Sales Manage settings res

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	s Management ture would you like to work wit		Dynamics 365		×		
	Fiscal Year Settings Set the start date, template, and display of	Apps (1) Other apps 🗸		channel integration	^		
7	Business Closures Create a list of holidays and other times v	Analytics				sources or delete existing	resources.
	Queues Create and manage service queues, and r and updates.	Collaboration Compliance & Legal Customer Service Finance	Dynamics 365 Channel			date group information a	id delete groups or group
5	Sales Territories Create new sales territories and assign te territories.	Geolocation Human Resources Internet of Things	Integration Framework By Microsoft Dynamics 365 Dynamics 365 The framework to build			te existing services.	
	Sites Create new sites or office locations where sites.	Operations & Supply Chain	immersive communication experiences to interact with $\bigstar \bigstar \bigstar \bigstar \bigstar \bigstar (4)$			cles.	
	Currencies Add new currencies or change the exchan	Productivity Sales	Get it now			ecords.	
3	Relationship Roles Manage the standard labels users can app					up rules for either out-of-	the-box entities or custom
ò	Rollup Queries Go to your list of Rollup Queries that you						
		Find more apps and consulting service	es at AppSource ∕?		• 		

*Figure 1 AppSource Dynamics 365 Channel Integration Framework* 





/licro

oft Dynamics 365	
Microsoft	
Microsoft Dynamics 365 <b>Dynamics 365 Channel Integration Framework</b> The Dynamics 365 Channel Integration Framework is a set of APIs (methods, events and protocols) that enables developers and partners to build immersive communication experiences such that hird party communication widgets running on channel provider/partner cloud can integrated interface applies for your users.	Add the application to Dynamics 365 Select the Dynamics 365 organization you want to add this application to.
Publisher: Microsoft Dynamics 365	Agree Cancel

Figure 2 Agree to Terms

Microsoft Dyn	amics 365			
Velcome				
VEICONIE				
TANCES UPDATES SERVICE	CE HEALTH BACKU	JP & RESTORE APP	LICATIONS	
anage your solutior	15			
	(w) 8000			
Manage your s	solutions			
Select a preferred s	solution to mana	ige on selected ir	nstance: Benemen (	Эу
SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS	
Al Builder for SharePoint F	F 2020.7.16.3	1/1/2050	Not installed	Channel ADI Integrat
Anchor solution for Dual .	1.0.22	1/1/2050	Not installed	Channel API Integrat
Channel API Integration Fr	r 9.1.0.420	1/1/2050	Installation pending	Please wait while installation starts. This may
Common Data Service Bas	s 9.2.2006.10	1/1/2050	Not installed	take a few minutes. Bring your communication channels and build
Common Data Service Sta	ar 9.2.2006.10	1/1/2050	Not installed	immersive experience with Dynamics 365
Contextual Help Base	1.0.0.12	1/1/2050	Installed	Created by: Microsoft
Core Service Scheduling	9.0.20103.1007	1/1/2050	Not installed	Learn more
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	

Figure 3 Install Channel Integration API

 $|4 \neq \flat | \downarrow|$ 



# 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 Voice for D365 in a multi-session app, like:

- Omnichannel for Customer Service
- Customer Service Workspace

To provision Omnichannel please follow the material provided by Microsoft:

https://docs.microsoft.com/enus/dynamics365/omnichannel/administrator/omnichannel-provision-license

# 1.2 Configure Azure app registration

For Voice for Dynamics 365 to work, an Azure App registration is needed for authentication purposes. Giving access to your D365 though an Azure App registration does not consume D365 licenses.

Configuring Azure App registrations is done by the following steps:

- Sign in to Azure portal (<u>https://portal.azure.com</u>)
- From the navigation menu, choose Azure Active Directory and Application registration
- Choose New Registration from top of the page

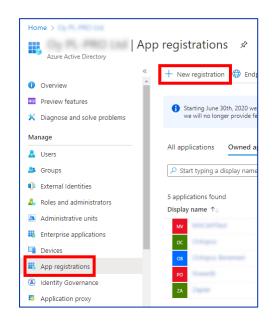


Figure 4 Create App Registration



- Fill in a name, for example Voice for Dynamics 365 for the app registration.
- All the other settings can be left as default. Choose Register.

* Name	
The user-facing display nan	ne for this application (this can be changed later).
Voice for Dynamics 365	1
voice for bynamics sog	
Supported account typ	bes
Who can use this applicatio	n or access this API?
<ul> <li>Accounts in this organi</li> </ul>	izational directory only (Oy PL-PRO Ltd only - Single tenant)
<ul> <li>Accounts in any organi</li> </ul>	izational directory (Any Azure AD directory - Multitenant)
<ul> <li>Accounts in any organi</li> </ul>	izational directory (Any Azure AD directory - Multitenant) and persona
Personal Microsoft acc	ounts only
Help me choose	
Help the choose	
Redirect URI (optional)	
	ion response to this URI after successfully authenticating the user. Prov
changed later, but a value is	s required for most authentication scenarios.
Select a platform	✓ e.g. https://example.com/auth

Figure 5 Register an Application

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

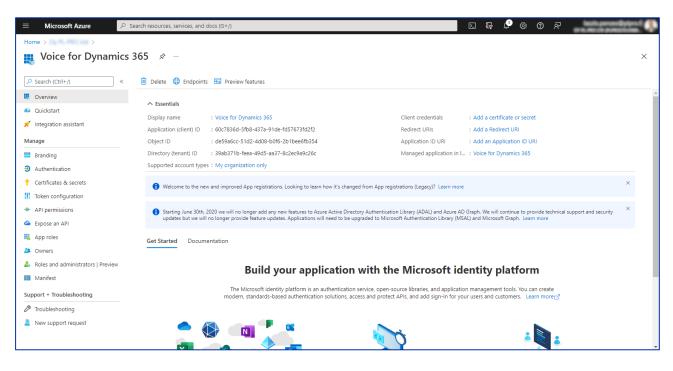


Figure 6 Registration done



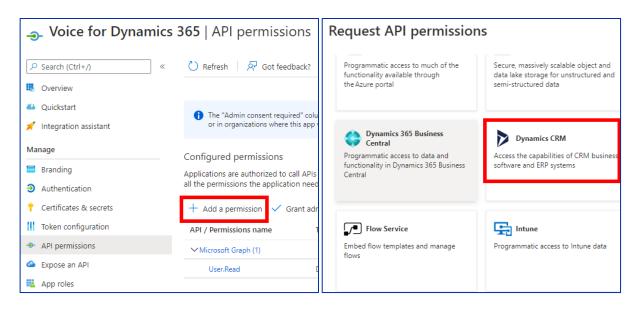
• App registration needs API permissions to be able to authenticate to your Dynamics 365 environment.

Choose API permissions from the navigation panel

Voice for Dynamics	365
₽ Search (Ctrl+/) «	Ē (
Overview	
🗳 Quickstart	
💉 Integration assistant	Ap
Manage	O
Branding	Di
Authentication	Su
📍 Certificates & secrets	
Token configuration	
- API permissions	
🙆 Expose an API	
u App roles	Ge

#### Figure 7 Select API Permissions

- Choose Add a permission
- Select Dynamics CRM from the pop-up window



#### Figure 8 API permissions

• Tick user\_impersonation selection and choose Add permissions



Rec	quest API permissions
< All A	
	Dynamics CRM
	https://admin.services.crm.dynamics.com/ Docs 🛃
vvnat	type of permissions does your application require?
Del	legated permissions
You	ir application needs to access the API as the signed-in user.
Selec	t permissions
<mark>,</mark> ₽ st	tart typing a permission to filter these results
	more Permission
$\sim$	Permissions (1)
	user impersonation ①
$\sim$	Access Common Data Service as organization users
-	
	dd permissions Discard

Figure 9 Add permissions

For authentication purposes, a client secret is needed.

Since Microsoft limits the expiration of secret keys created on the user interface to 2 years, the client secret must be added using a script.

- Navigate to main properties of App Registration by clicking Overview on the left
- Copy the value of Object ID attribute to clipboard

Home >	Voice for Dynamics	365 🖈 …
Voice for Dynamics	✓ Search (Ctrl+/) «	💼 Delete 🜐 Endpoints 📧 Preview features
	K Overview	Got a second? We would love your feedback on Microsoft identity platform (previously Azure A
Search (Ctrl+/) «	🗳 Quickstart	
	🚀 Integration assistant	∧ Essentials
Overview	Manage	Display name : Voice for Dynamics 365
	🔤 Branding	Application (client) ID : 60c7836d-5fb8-437a-91de-fd5767 Copy to clipboard
🗳 Quickstart	<ul> <li>Authentication</li> </ul>	Object ID : de59a6cc-51d2-4d08-b0f6-2b1bee6fb354
💉 Integration assistant		Directory (tenant) ID : 39ab371b-feea-49d5-aa37-8c2ec9a9c26c
integration assistant	📍 Certificates & secrets	Supported account types : My organization only

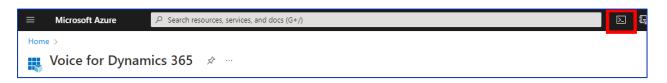
Figure 10 Copy Object ID

• Replace OBJECT\_ID in the following script with the copied value



```
Connect-AzureAD
$startDate = Get-Date
$endDate = $startDate.AddYears(100)
$aadAppsecret01 = New-AzureADApplicationPasswordCredential `
   -ObjectId OBJECT_ID `
   -CustomKeyIdentifier 'Voice' `
   -StartDate $startDate `
   -EndDate $endDate
Write-Output $aadAppsecret01
```

• Open Cloud Shell by clicking the icon on top menu bar



#### Figure 11 Open Cloud Shell

- Paste the script and hit Enter. A client secret is created with 100 years expiration.
- Save the secret key value into a secure place as it is not visible afterwards.

PS /nome/laszi	o> Connect-AzureAD
	p> \$startDate = Get-Date
PS /home/laszle	\$endDate = \$startDate.AddYears(100)
PS /home/laszle	b> \$aadAppsecret01 = New-AzureADApplicationPasswordCredential -ObjectId c
PS /home/laszl	o> Write-Output \$aadAppsecret01
CustomKeyIdent	ifier :
CustomKeyIdent EndDate	ifier : : 12/28/2121 11:59:49 AM
EndDate	



Once secret key is created, send the following details to Enreach:

- secret key value
- application id
- directory id (from overview page)

Enreach will then deploy back-end components for integrations to work.



After the Azure App registration is completed, next step is to Install Voice for Dynamics 365 package and set up an application user in Dynamics 365.

# 1.3 Install Voice for Dynamics 365 package to Dynamics 365 Instance

Install Voice for D365 managed package provided by Enreach and login to appropriate Microsoft Dynamics 365 organization with System Administrator credentials.

# VoiceForD365Package contains the following:

- The package contains solutions with base entities, configuration data and settings, links for the Azure apps/functions.
- Voice channel provider
- 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).
- Then run PackageDeployer.exe and go through the standard wizard.
- Wizard will guide the user through all the needed steps for installation.

eneral Sec	urity Details Previous \	/ersions	
0.	DeploymentPackage.dll		
Type of file:	Application extension (.d	II)	
Opens with:	Unknown application	(	Change
Location:	C:\Dev Install\Deployme	ntPackage (5)\	DeploymentPac
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 Hid	den	Advanced
Security:	This file came from anoth and might be blocked to this computer.		Unblock

*Figure 12 Deployment Package properties* 



Voice for Dynamics 365 by Enreach  $$\rm V$$  1.4

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		



Connect to Microsoft Dynamics CRM   Deployment Type:   On-premises   Office 365   Server   Port   Ort   Use SSL   Authentication Source:   Active Directory   Sign in as current user   User Name   Password   Domain   Display list of available organizations	Mackage Deployer for M	icrosoft Dynamics CRM	-	
Server   Port   Luber SSL   Authentication Source:   Active Directory   Sign in as current user   User Name  Password  Domain	Connect to Micr	osoft Dynamics CRM		
Port Use SSL   Authentication Source: Active Directory   Sign in as current user   User Name   Password   Domain	Deployment Type:	On-premises      Office 365		
Authentication Source: Active Directory   Sign in as current user   User Name Password Domain	Server			
Sign in as current user       User Name       Password       Domain	Port	Use SSL		
User Name Password Domain	Authentication Source:	Active Directory ~		
Password Domain		Sign in as current user		
Domain	User Name			
	Password			
Display list of available organizations	Domain			
	Display list of avail	able organizations		
	Login			
Login	5			
Login				
Login				
Login				

Figure 14 Insert your company information



🚈 Package Deployer	for Microsoft Dynamics CRM			_	×
Connect to I	Microsoft Dynamics CRM				
Deployment Type:					
Sign in as cu					
<ul> <li>Display list o</li> </ul>	f available organizations				
Show Advan	ced				
Advanced					
Online Region	Europe, Middle East and Africa	$\sim$			
User Name	your.email@company.com				
Password	•••••				
Login					

#### Figure 15 Company information example

fultiple CDS Organizations are ava rganization you would like to con	ailable to you. Please choose the CDS mect to.		
CRM Region	Organization Name		
Europe, Middle East and Africa			
Europe, Middle East and Africa	Benemen		
Europe, Middle East and Africa	Benemen		
Europe, Middle East and Africa	Benemen		
Europe, Middle East and Africa	org		
Europe, Middle East and Africa	org		

#### Figure16 Connect to Microsoft Dynamics CRM



M Voice for D365 Customizations Setup for Microsoft Dynamics CRM		-
Welcome to the Voice for D365 Customizations Setup Tool		
Voice for D365 by Enreach Customizations and Settings		
Voice for D365 by Enreach Deployment Package		
- Voice for D365 Customizations solution will be installed - Voice for D365 Configurator app will be created - Voice for D365 channel provider will be created in Channel Integration Framework - Voice for D365 configuration data will be added		
Click Next to Continue		
<		>
	Previous	Next

#### Figure 17 Voice for D365 Package

Voice for D365 Customizations Setup for Microsoft Dynamics CRM		-		
Ready to Install				
Solution Package : Voice for D365 Customizations				
Organization : unqd74bf34e78674714afda9368f34b4				
To make changes, click Previous. To install the solution package, click Next.				
	Previous		Next	

#### Figure 18 Ready to Install



4	Voice	for D365 Customizations Setup for Microsoft Dynamics CRM	_		×
	Read	ding Voice for D365 Customizations Installer Configuration			
	Status:	Ready			
	Organ	ization : unqd74bf34e78674714afda9368f34b4			
	View lo	ng file			
	Ø	Import configuration loaded.			
	ø	Found 2 solutions.			
	Ø	Found the solution: Voice for D365 by Enreach, version: 1.1.7.7 (Managed)			
	Ø	1. Dependency Found : Dependency on solution ChannelAPIIntegrationFramework found on target environment			
	ø	2. Dependency Found : Dependency on solution msdynce_AppCommon found on target environment			
	⊘	Found the solution: BeneVoice CIF2, version: 1.1.7.0 (Managed)			
	ø	Found the detailed data to import.			
	ø	Initializing 1 connection threads for detailed data import.			
		Previous		Next	

#### Figure 19 Installer Configuration

xec	uting Install Actions		
tatus:	Importing data files		
)rgani	zation : unqd74bf34e78674714afda9368f34b4		
Ø	Skipping solution Voice for D365 by Enreach. Version 1.1.7.7 of the solution is already loaded.		
•	Skipping solution BeneVoice CIF2. Version 1.1.7.0 of the solution is already loaded.		
Ø	Pre-import process complete.		
0	Running complex data import.		
•	Parse Complete		
0	Beginning Import To CRM Importing 5 entities - 37 records		
О	Running Schema Validation		
iew lo	g file		
	Previous	Next	

#### Figure 20 Executing Install Actions



W Voice for D365 Customizations Setup for Microsoft Dynamics CRM	_		×
Installation Complete			
			_
			~
Voice for D365 by Enreach Deployment Package			
Import completed			
			$\sim$
<		>	
		Finish	

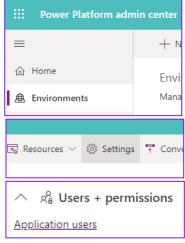
Figure 21 Installation Complete

**PLEASE NOTE:** All future updates after the first installation are also done with the Package Deployer / Wizard!

# 1.4 Configure application user in D365

# Please complete Azure App registration before proceeding to configuring the application user in Dynamics 365.

- Navigate to <u>Power Platform admin center</u> and sign in as System Adminstrator
- Click **Environment** on the top-left and select the environment from the list.
- Click **Settings** on the top ribbon.
- Click Users + permissions, and then select Application users.
- Click **New app user** on top ribbon.
- Click **Add an app** and select the application created in chapter 1.2 Configure Azure app registration.





- Select a **Business Unit** from the drop-down list. It is recommended to select the root business unit.
- Click *P* next to **Security roles**.
- Select Voice ApiUser role.
- Click **Save** to select the role.
- Click **Create** to create the application user.

# 1.5 Voice for D365 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

Apps 63 × + Create new App 🕐 Refresh 🛛 🖓 Filter Search my apps... Published Apps (25) 1  $\triangleright$ Dynamics 365 —Benemen Benemen Sales BeneVoice Configurator Billing 2nd Line Support Provides access to the full suite of capabilities, including administration BeneVoice configuration settings Microsoft Dynamics 365 Default Publisher for benemer Default Publisher for bener fault Publisher for bene UNIFIED INTERFACE UNIFIED INTERFACE UNIFIED INTERFACE WEB UNIFIED INTERFACE benemen Customer Service worksp... Channel Integration Fra.. Customer Service Hub Deployment Dynamics 365 App for O.. Provides access to Dynamics 365 App for Outlook for enabled user Bring your com and build imme munication ch ersive experien A focused, interactive experi managing your customer se tomer Ser ductivity to Default Publisher for benemen Default Publisher for beneme Default Publisher for benemen osoft Dynamics 365 Microsoft Dynamics 365 UNIFIED INTERFACE UNIFIED INTERFACE UNIFIED INTERFACE UNIFIED INTERFACE UNIFIED INTERFACE Ð Ð 旦 (\*\*\*) Dynamics 365 Portals IT Support Numsi Operator Info Portal

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.



III 🕜	Channe	I Integration Framework		ନ ଓ ନ <b>+</b> ବ
=		$\leftarrow$ 🕼 Show Chart + New 🗊 Delete $\lor$ 🕐 Refresh	🖾 Email a Link 🛛 🛩 🔊 Flow 🗸 🗐 Run Report 🗸	🖷 Excel Templates \vee 🛛 🖉 Export t
<ul><li>☆ Home</li><li>○ Recent</li></ul>	~	Active Channel Providers $\checkmark$		Ƴ Quick fi
Pinned	×	$\checkmark$ Name $\uparrow$ $\checkmark$	Channel Order $\checkmark$ Label $\checkmark$	Created On $\checkmark$
Channel Provider Configuration		benevoice	1 Bene Voice	12.11.2020 13.37
Channel Providers	5			



	Channe	el Integratio	on Frame	work										Q	Ø	Q	+	$\mathbb{Y}$	©	?
ome cent	~	← 🗔	voice	_	& Close	+ New	Deactivate	🗊 Delet	e 🖒 Refresi	n 🕼 Email a Link	≫ Flow ∨	đ	Word T	emplates	. ~	💷 Ru	n Report	~		
nned	$\sim$	Chann	el Provi	der Confi	iguratio	on														
l Provider tration		Na	ame		* be	enevoice		Sele	t Unified Int	erface Apps for th	ne Channel		Sele	ct the F	Roles f	for the	Channe	el		
annel Providers		La	ibel		* Be	ene Voice			Benemen Sales ×	Support ×	~			Benemen E		Beneme	n Support	x		~
		Cł	nannel Uf	RL	* ht	ttps://app-be	n-webp 🕀													
			nable Out ommunic		* Ye	es														
		Cł	nannel Or	rder	* 1															
		AF	PI Versior	n	1.	0														
		Tro	usted Do	main	ht	ttps://app-be	n-webp 🕀													
		CL	ustom Pa	rameters		-														

*Figure 28 Voice 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

Channel configuration for CIF2 is maintained by the Deployment Package. However, the channel itself must be added to an Application Profile.

To do it,

- Sign in to the <u>Power Apps portal</u>.
- In top-righ corner, select the environment you are adding the channel to.
- Select **Apps** on the left menu.
- Select the ellipses next to **Omnichannel for Customer Service** or **Customer Service** workspace.
- On the menu that appears, select **App profile manager**.
- Select **App profiles** on the left menu, and then select your app profile (or create a new one if you don't have any custom app profile yet).
- On the app profile select the **Channels** tab.

	III Power Apps   App profile manager							
≡	= + New profile ℓ A Assign users							
ώ	Home	Voice for Dynamics 365 by Enreach						
đ	App profiles	Customize the user experience of this profile. Learn more						
⊗ @	Customer Service w $ arsigma$ Omnichannel Admin $ arsigma$	General Session templates Productivity pane Channels Inbox						
		Omnichannel for Customer Service         Voice channel providers           If this is turned on, every channel you have set up in Omnichannel for Customer         Add a independent voice channel to this app profile. Learn more						
		All active channels On						
	<ul><li>In the searc</li><li>From search</li></ul>	<b>Woice channel providers.</b> Sch box, type "voice". Add a independent voice channel to this app profile. Learn more <b>Voice for Dynamics 365 by Enreach.</b> Voice for Dynamics 365 by Enreach Create a new channel provider in Unified Interface						



# 1.5.2 Users

# 1.5.2.1 Update enreach Cloud User ID

Open Voice Configurator App

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(L) Recent	ρβearch my apps						+ Create new App 🖔 Refresh 🤨
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Callbacks	Dynamics 365 —Benemen	Channel Integration Fra	CRM Hub	Customer Service Hub	Customer Service worksp	Dynamics 365 App for O	Project Resource Hub
↔ Callback	Provides access to the full suite of capabilities, including administration	Bring your communication channels and build immersive experience with	Mobile app that provides core CRM functionality including accounts,	A focused, interactive experience for managing your customer service.	Multi-session Customer Service with Productivity tools	Provides access to Dynamics 365 App for Outlook for enabled users.	Project Resource Hub Module
🔀 Callback	Microsoft Dynamics 365 12/29/2021	MicrosoftDynamics	MicrosoftDynamics	Default Publisher for benemen 8.12.2021	MicrosoftDynamics	MicrosoftDynamics	MicrosoftDynamics
🖺 Queues	WEB	UNIFIED INTERFACE	UNIFIED INTERFACE	UNIFIED INTERFACE		UNIFIED INTERFACE	UNIFIED INTERFACE
Smart Routir	2 B	R	٢	(þ.	ß	G enreach	Å
🛠 Enreach							
Channels	Project Service	Resource Scheduling	Sales Hub	Sales Team Member	 Solution Health Hub	 Voice for D365 Configura	 Voice of the Customer
X Channel	Project Service Automation Application.	Provides access to the Resource Scheduling solution	Modernize the sales experience with this mobile relationship	Team Member access to the Dynamics 365 Sales app module.	Solution Health Hub enables rules- based validation on the health of	Voice for D365 by Enreach configuration settings	Provides Voice of the Customer capabilities using Unified Interface.
	MicrosoftDynamics UNIFIED INTERFACE	MicrosoftDynamics UNIFIED INTERFACE	Default Publisher for benemen 12/8/2021 UNIFIED INTERFACE	MicrosoftDynamics UNIFIED INTERFACE	MicrosoftDynamics UNIFIED INTERFACE	Default Publisher for benemen 12/10/2021 UNIFIED INTERFACE	MicrosoftDynamics UNIFIED INTERFACE

Figure 29 Voice Configurator App

Changing any of the followings automatically triggers Enreach user ID update:

- Setting Enreach Cloud User Email
- Assigning Voice User role

User IDs can be updated manually as well:

• Navigate to Users Settings and choose Update Enreach User Ids –button (at the top of the page)



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Configuration	# AlBuilder_StructuredML_Prod_CDS	Benemen [
🛠 General Settings	# AlBuilderProd	Benemen [
SUsers Settings	# AriaMdIExporter	Benemen [
Callbacks	# azureadmin	Benemen [

*Figure 30 Update Enreach User Ids* 

• Wait couple of seconds and Enreach User Ids should appear on the user list for the users that have same email address than in Enreach Cloud.

r Di	65 Cont	igurato	r		✓ Search				SAND	BOX Q + T
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	0	8	Full Name ~		Business Unit 🗸	Title ~		Main Phone ~	Enreach Cloud User Id $\downarrow$ $\checkmark$	Enreach Cloud User Email $\sim$
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			Patrik Vaskivuori		Benemen Dev	QA Sp	ecialist		a0c957dc-0051-e711-80c9-0050568	abigail.dickens@domain.com
			Olli Kojonen		Benemen Dev				724fe824-034f-e911-80d4-0050568	webrtc.user1@domain.com
			Igor Shevchenko		Benemen Dev				2a3b5779-15ef-e911-80de-0050568	

Figure 3	1 Enreach	Cloud	User	Id
1 1801 0 0	i Linicacii	ciouu	0507	10

- After updating the ids, if some user is missing the Enreach User id, then you need to manually update the correct Enreach Cloud Email to Enreach User Email field on the user record:
  - Enreach User Id unique identifier of the user in Enreach Cloud

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Patrik Vaskivuori - Saved User								
Voice for D365 Settings	Voice for D365 Settings Related							
Enreach Cloud User Id	a0c957dc-0051-e711-80c9-00505689257e							
Enreach Cloud User								



• Enreach User Email (optional) - should be filled in if email user in D365 differ from Enreach Cloud

# 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

+ New profile $$ $$ Assign users				
Voice				
Customize the user experience of thi	is profile. Learn more	<u> </u>		
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1.5.3 Phonecall sync settings (Enterprise Calls)

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



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=	$\leftarrow  \fbox{Show Chart}  + \text{New}  \fbox{Delete} \mid \lor  \circlearrowright \text{Refresh}$	🖙 Email a Link 🛛 🗸 🔊 Flow 🗸 🔟 Run Repo	nt \vee 🖷 Excel Templates \vee 🖪 Export to Excel   🗸
<ul> <li>分 Home</li> <li>(<sup>1</sup>) Recent ∨</li> </ul>	Phone Call Sync Settings ~		
🖈 Pinned 🗸 🗸	○ Name ↑ ~	Value ~	Description ~
Configuration	CallStartMargin	15	value in seconds, used to set range of searching existing phone c
General Settings	DefaultCrmAssignee	fbc423f5-74f9-e911-80e0-00505689257e	bene user id, which is set as owner of phone call, in case bene use
Q Users Settings	EnableAudit	True	bool value, which defines either to set in BenemenApiAudit field of
Callbacks	EnableMultipleMatchCreate	True	bool value, which defines if service calls should be created when
Callback Profiles	ExecutionInterval	120	value in minutes, which is taken from execution start and set into
Callback Lists	IncomingDirectCallSubject	Incoming direct call	string value, defines subject of direct phone call.
🖺 Queues	IncomingQueueCallSubject	Incoming queue call	string value, defines subject for service phone calls
Smart Routing	MultipleMatchPhoneCallStatus	1	int value, which should exist as status reason value of phone call
🖒 Enreach Queues	OutgoingDirectCallSubject	Outgoing direct call	string value, subject for outgoing phone calls.
Channels	ProcessDirectCalls	True	bool value, defines weather direct answered calls should be retrie
🛠 Channel Providers	ProcessServiceCalls	False	bool value, defines weather service answered calls should be retri
	ProcessServiceCallsUnanswered	False	bool value, defines weather service unanswered calls should be re
	RunInDebugMode	False	bool value. When set true, start date of phone calls retrieved fron

*Figure 33 Phonecall Sync Settings* 

		Voice for D365 Configurator							✓ Search		
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쏬	Callback Lists										
Ľ	Queues			A Desc	ription		bene user id, whi	ch is set as c	wner of phone ca	ll, in case bene	user was not
C	ert Dautina										

Figure 34 DefaultCRMAssignee

• **CallDurationLimit** - Minimum duration of calls (in seconds). If the duration of a call is below this limit then the call is not synchronised to Dynamics.



- **CallStartMargin** value in seconds, used to set a range of searching existing phone calls, to avoid creating duplicates.
- **DefaultCrmAssignee** Enreach user id, which is set as the owner of a phone call, in case user Enreach user was not found in D365. Current value e.g. fbc423f5-74f9-e911-80e0-...

The value can be any Enreach user id chosen by the customer organization.

- **EnableAudit** boolean value, which defines to set in Enreach Api Audit field of a phone call in D365. In case it is false, the field will be set as CallId is {Enreach call id}, in other cases, all the values retrieved from the Enreach 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 Enreach 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 Enreach API is execution date 45 days and the end date is now.
- MultipleMatchesPickFirst Boolean value, default: False. When set to true, the first account or contact is picked by Enterprise Call Sync and Callback Sync, if multiple accounts/contacts found. This way calls created by back-end synchronization will more likely point to an actual customer.

Phone call synchronization Azure WebJob runs continuously. After executing the business logic, it sleeps for 60 seconds. It means that in practice synchronization runs nearly every minute.

**Important to note** that to make call synchronization work, **DefaultCrmAssignee** setting must be set properly (see in the list above).



When synchronizing phone calls, the following fields are set based on the identity of the user who made or answered the call within the organization:

- Owner
- Activity party (Call From/Call To, based on call direction)

If the user who made the phone call is not a Dynamics user, a fallback (default) user is set to the fields above. The value of *DefaultCrmAssignee* setting determines this fallback user.

The value of this setting must be the Enreach Id (NOT Dynamics CRM Id) of the fallback user. It can be any user with an Enreach Id - either a real or a technical user. To avoid any confusion to the users (because of a different user appearing on a call than who actually made that call) it is recommended to set the Id of API user (or any other technical user):

- Open Voice for D365 Configurator app
- Navigate to User Settings
- From the list, find your API user (see 1.2 Configure Azure app registration)
- Open the user record and set the Enreach email of API user to Enreach Cloud User Email (e.g. <u>mycompany.apiuser@mycompany.com</u>). Enreach support can help you to have this value.
- After saving the record, Enreach Cloud User Id of the user gets populated
- Copy the id
- Navigate to General Settings -> Phone call Sync Settings -> DefaultCrmAssigneet
- Paste the id to Value field and save the record

At night, between 10:00PM and 11:30PM UTC a so-called retroactive call synchronization is carried out. The exact time of execution is picked randomly to avoid overloading the back-end infrastructure by executing simultaneously for multiple environments.

Retroactive sync retrieves all calls from Enreach API wich were made in the past 24 hours. Then tries to create the calls in CRM. As a result, if a user adds a contact or account with identical phone number to CRM after the call was made but before retroactive sync kicks in, such calls will be synced at night.

**Note:** Users mobile number needs to be saved to User form in Dynamics 365 for all users that are going to need their phonecalls to be synced from mobile to Dynamics 365. By default calls that are classified as Work calls (Call information Privacy setting in Voice Center side) are synchronized. Unclassified and Private calls are not Synced to D365.



# 1.5.4 Callbacks

# Callbacks can be configured only after you get a confirmation from Enreach.

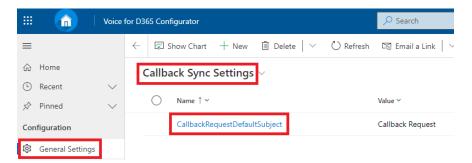
Callbacks are synchronized from Enreach API into Dynamics 365 by an Azure WebJob, hosted in Enreach's Microsoft Azure tenant, maintained by Enreach. Application retrieves callback requests from Enreach API, transforms data into corresponding D365 format, maps to D365 contact/account/lead, and creates corresponding phone call records in D365.

Callback synchronization Azure WebJob runs continuously, similarly to call synchronization. After executing the business logic, it sleeps for 60 seconds. It means that in practice synchronization runs nearly every minute.

**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.

#### 1.5.4.1 Basic configuration

By going to General Settings area within Voice for D365 Configurator app and selecting Callback Sync Settings view, the default subject of callback request phone call activities can be adjusted by amending the value of CallbackRequestDefaultSubject setting.



Besides the global setting, a subject can be specified on callback profile-level as well (see below), which overrides the global setting.

To configure callbacks in Dynamics 365, at least one callback profile needs to be added with the following (example) settings:



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Configuration		
		Name * Default Callback Setting+
A Users Settings		Callback List * 😢 Dynamics Benemendev List
Callbacks		Queue * 🛅 Test Queue
😵 Callback Profiles		Age Time Unit Minutes
🔮 Callback Lists		Callback Age <b>10</b>
🖺 Queues		
Smart Routing		Ownership Rule * API User
없 Enreach Queues		Phone Call Subject Callback

Figure 35 Callback Profile Example Settings

- Callback List: lookup to a virtual entity, which is retrieved from Enreach API.
- **Queue**: lookup to OOB D365 entity Queue. Defines to which queue callbacks should be assigned to.
- **Ownership Rule:** controls how callback requests are assigned to users:
  - **API User:** callback requests will be owned by the API user (application user)
  - Owner of Queue: owner of callback requests will be identical to owner of target queue
- **Phone Call Subject:** the subject set to phone calls created by the integration. It can optionally be specified here, on callback profile level. If no value is given here then the global setting is used (see above).
- **Duplicate Handling Rule**: specifies how multiple callback requests from the same number are handled
  - **Bundle calls**: All callback requests are synced to Dynamics. If at the same time more than one open callback requests exist, the calls are linked to each other and can be seen on Phone Call form.



- Ignore additional calls: Additional callback requests from the same number within the same call queue are ignored, only one callback request is created in Dynamics
- Synchronization method: See chapter 1.5.4.1 Synchronization methods.
- Age Time Unit: A unit of the time-period, can be Days, Hours or Minutes. Controls the size of time window when querying callbacks from Enreach API. Visible in case of certain synchronization methods only. See chapter 1.5.4.1 Synchronization methods.
- **Callback Age**: Number value of defined periods in the previous field. Visible in case of certain synchronization methods only. See chapter 1.5.4.1 Synchronization methods.

All active callback profiles will be proceeded during execution of the callback synchronization job.

Global callback settings configurable within Voice for D365 Configurator app's General Settings -> Callback Sync Settings:

- CallbackRequestDefaultSubject: Default subject of callback requests. Can be amended freely
- CallbackRequestRecipientRule: Defines if the recipient ("to" field) of callback requests should be the referenced queue or the owner of that queue. Valid values:
  - QueueOwner: "to" field points to the owner of queue
  - Any other value: "to" field points to the queue referenced by the callback profile

# 1.5.4.1 Synchronization methods

Callback integration supports two ways to bring callbacks to Dynamics: *polling* (Dynamics reaches out to Enreach API on a regular basis to fetch callbacks) and *webhook* (Enreach API pushes callbacks right after creation).

Synchronization Method field of callback profile controls how the callbacks are getting synchronized.

Synchronisation Method	* Webhook
	Polling
	Webhook
	Webhook backed with polling

- Polling: Dynamics fetches
   Callbacks from Enreach API every
   minute. The age of callbacks retrieved is specified by Age Time Unit and Callback
   Age fields.
- **Webhook**: Enreach API pushes callbacks to the webhook listener web service of Voice for Dynamics 365. Provides more efficient operation in case of large number of callbacks.



• Webhook backed with polling: Same as webhook, but polling on a regular basis is also active as a backup. If callbacks are for any reason left behind by webhook sync, the service executed on a regular basis will still synchronize those.

#### Setting up polling sync

This section applies to synchronization methods **Polling** and **Webhook backed with polling**.

The value of Age Time Unit and Callback Age have an influence on performance; the wider the time window, the more data the component will have to handle on each execution. Callback synchronization is triggered every minute, therefore, in a production environment (where it is likely to have more calls) doesn't make sense to set the value to more than one hour. In QA and DEV environments it may be longer, several hours or even days.

Callback Synchronizer service caches the settings, refreshing the cached data every 60 minutes. It means that any change to callback configuration (activating-deactivating callback profiles, creating new ones, amending any detail) will take place at the next refresh (within max. 60 minutes).

No other actions are needed to set up polling sync. After the callback profile has been created and the service picked up the new settings, synchronization starts automatically.

#### Setting up webhook sync

Webhook synchronization is not enabled on the back-end services by default. To make webhook sync work, additional actions must be taken by Enreach staff to configure integration through webhook listener.

If you would like to utilize this synchronization method, please contact Enreach support.

1.5.5 Dynamics 365 apply Phone call form

Voice for D365 – 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 right-side corner of the App)



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Figure 36 Open in App Designer

- Add Phone Call table to the list of pages, if it is not already included
- Change the Main form to Voice for D365 Phone Call
- Include Quick View and Quick Create Forms to the app solution.

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E Customers Accounts view	Customers	Description	Call From P Lá	iszló Pénzes			Cuick Form Quick View Form Phone call quick create fo Quick Create Form	
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⊂, 🗋 Contacts form			Direction Outgo	bing			Phonecall card Card Form	
All other pages			Phone Call Details					
			Actual Start					

Figure 37 Change the forms to Voice - 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

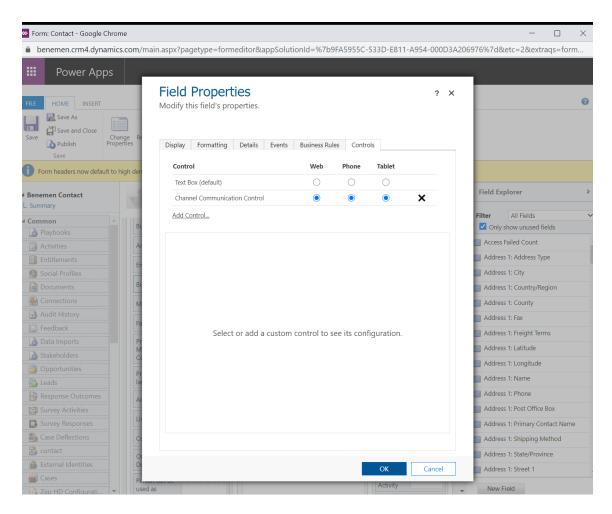


Figure 38 Channel Communication Control



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

# 1.6. Smart Routing in Voice for Dynamics 365

There are multiple ways to enable smart routing for Voice for Dynamics 365. Smart Routing setup is always dependent on the specific customer needs and use case scenarios. The best way to plan the smart routing setup is to consult both Enreach deployment team and the Dynamics 365 Integrator partner before the deployment & configuration of Voice for Dynamics 365. In this configuration guide we present the REST API based model for smart routing.

By utilizing Smart Routing capabilities, calls arriving to a voice pool can be redirected to another pool or to a certain agent, based on data in Dynamics 365. For example if the call is coming from a number which is – either directly or indirectly – related to a VIP customer then the call can be redirected to a queue dedicated to such customers.

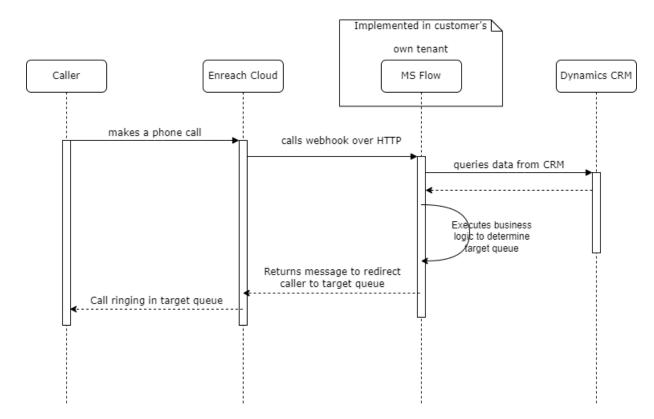
The following steps have to be carried out by the Dynamics 365 integrator partner to set up Smart Routing:

- Create a JSON REST API, e.g.
  - MS Flow with "When a HTTP request is received" trigger
  - Azure Function App
  - Azure App Service with a REST API
- Receive the data in the API (see below)
- Query Dynamics CRM database according to business needs
- Based on the queried data, return a response to redirect the caller (see below)
- Send the URL of your webhook and authentication key to Enreach, together with the queue(s) where this functionality is needed. Enreach will then set up the queue to call the web hook.

The whole mechanism is visualized on the following diagram:







#### 1.6.1 Receiving data

The API has to accept data in JSON format according to the following schema:

```
{
    "type": "object",
    "properties": {
        "anum": {
            "type": "string"
        },
        "bnum": {
            "type": "string"
        }
    }
}
```

Example payload:

```
{
   "anum": "+35850454564", // phone number of caller
   "bnum": "+35840675644" // phone number of pool the call is in at the moment
}
```

Business logic will then find the caller in Dynamics CRM based *anum* and determine the needed action. Phone numbers have to be saved to CRM in the correct format, with no spaces or other characters, and starting with international calling prefix (plus sign). If phone



numbers happen to be saved to CRM in local format then by removing first few (3-4) characters of anum, the rest can be matched to CRM data using *contains* comparison.

# 1.6.2 Authentication

Besides the payload, Enreach Cloud is sending an X-Benemen-APIKey HTTP header as a means of authentication. The API key must be validated by the business logic and return HTTP 401 Unauthorized if doesn't match.

#### 1.6.3 Redirecting the call

When the phone number of target queue has been determined by the business logic, it is returned as an HTTP response.

Example payload:

```
{
    "InitialTarget": "+35853445657", // phone
number of target queue or agent
}
```

#### Things to notice:

- If no redirection has to be done (e.g. customer not found) then HTTP 204 No Content response must be returned
- Returning the same bnum from the request as InitialTarget is forbidden because it would cause an infinite loop in Enreach cloud. In such a case returning HTTP 204 is recommended.

The implementation of a Power Automate flow can be seen on the screnshot as an example.

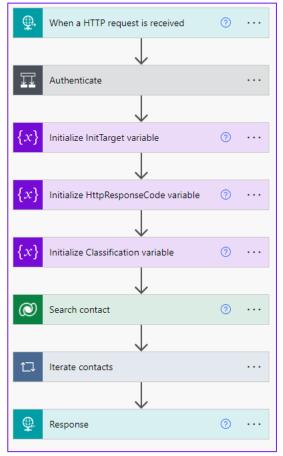


Figure 39 Example Power Automate flow

1.6.4 Useful links to technical documentation for Smart Routing scenarios

More detailed technical documentation for developer needs:

https://benemen.atlassian.net/wiki/spaces/PD/pages/1215791782/SmartRouting+HTT P+Integrator+Guide

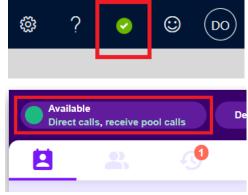


Azure function App example:

https://docs.microsoft.com/en-us/azure/azure-functions/functions-create-serverlessapi

# 1.7. Omnichannel user presence integration

If the Dynamics environment is running Omnichannel (user status feature is available as in the upper right screenshot), which uses Unified Routing engine to distribute work items to the user, it is essential to keep user status of Omnichannel and Web Phone in sync. If the status of user becomes Do not Disturb – either because of reaching maximum capacity or the user manually changed the status – , the system automatically blocks incoming calls by setting the user DND in Web Phone as well.



There are two basic use cases regarding this feature:

- User status gets changed when a call is not in progress
- User status is changed by call events

When user status is changed when not in a call, status is mirrored between Omnichannel and Web Phone according to the following mappings:

OC state	Web Phone state
AVAILABLE	Available (0)
BUSY	Busy (1)
BUSY_DO_NOT_DISTURB	DND (2)
OFFLINE	OffWork (3)
AWAY	Away (5)

When the agent is receiving or making a call, Omnichannel status is se to *Do not Disturb*, to prevent Unified Routing from distributing any work item to the user during a call.



When the call ends, Omnichannel status is reset to the value which was active right before the call.

The feature is implemented within the following built-in JavaScript plugins:

Plugin	Event	Purpose
Enreach.Plugins.HandleOCPresenceChange	onPresenceChange	Mirrors OC presence to WebRTC
Enreach.Plugins.HandleWebRTCPresenceChange	user-status-changed	Mirrors WebRTC presence to OC
Enreach.Plugins.OCPresenceDND	call-incoming	Saves the value of current OC presence, then changes OC presence to DND
	call-answered	
	call-started	
Enreach.Plugins.OCPresenceReset	call-ended	Resets OC presence to the saved value

All the plugins above are deployed automatically to the system and are by default enabled, no need to configure the feature in any way.

# 1.8. Test Voice for Dynamics 365 functionality

If everything was set up correctly, you should see the Voice for Dynamics 365 sidebar in the configured applications. Inbound& outbound calls, automatic phone call activity creation, Click-toDial and callback handling (if configured) are now available for the end users.



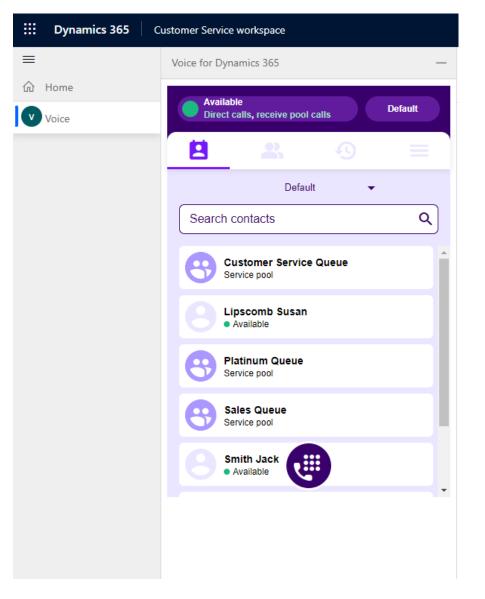


Figure 40 Voice for Dynamics 365, Customer Service Workspace (CIF2) (On the left side of Dynamics 365 UI)



Q + 7 🕸	? 🕞
Voice for Dynamics 365	>
Available Direct calls, receive pool calls	Default
2	=
Default 🗸	
Search contacts	٩
Customer Service Queue Service pool	ĺ
Lipscomb Susan • Available	
Service pool	
Sales Queue Service pool	
Smith Jack • Available	

Figure 41 Voice for Dynamics 365 Model Driven App (CIF1) (on the right side of Dynamics 365 UI)