



**enreach**

# VOICE 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 Voice for Dynamics 365 solution.

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

### Pre-requisites

- Customer's Microsoft Dynamics 365 org. and needed Dynamics 365 apps are activated for Voice for Dynamics 365 usage.
- End user is activated for Enreach Cloud for Dynamics 365 both Microsoft Dynamics 365 org. and Enreach Cloud.
- End user's Enreach Cloud user role must include Voice web phone usage in-order to use workstation-based phone use cases. "Voice User"-role privileges are required in D365.
- Embedded Voice 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 Login to the solution

1) User logs in as normal to Microsoft Dynamics 365 web user interface

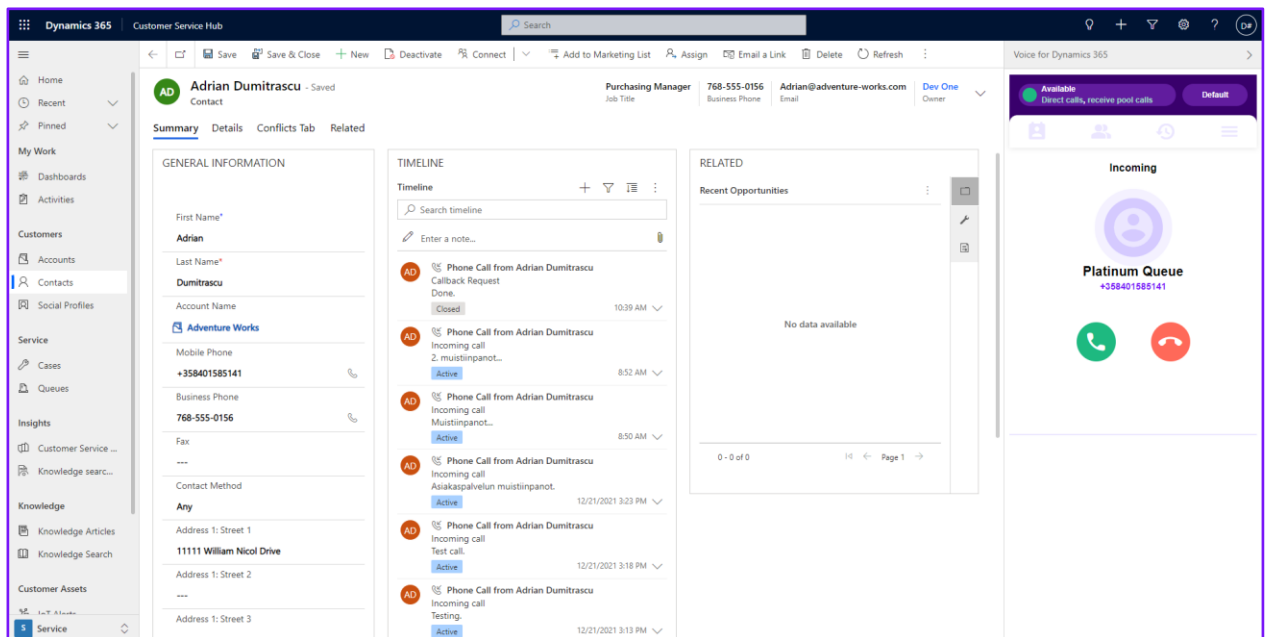
2) User opens any Dynamics 365 app, where also Voice for Dynamics 365 is activated.

3) Voice web phone panel is visible on the right side of Dynamics 365 App UI (in case CIF1 single-session app) or on the left side of the App UI (in case CIF2 multi-session app). Voice for Dynamics 365 will log in automatically. Please allow the microphone use / access by the Chrome browser.

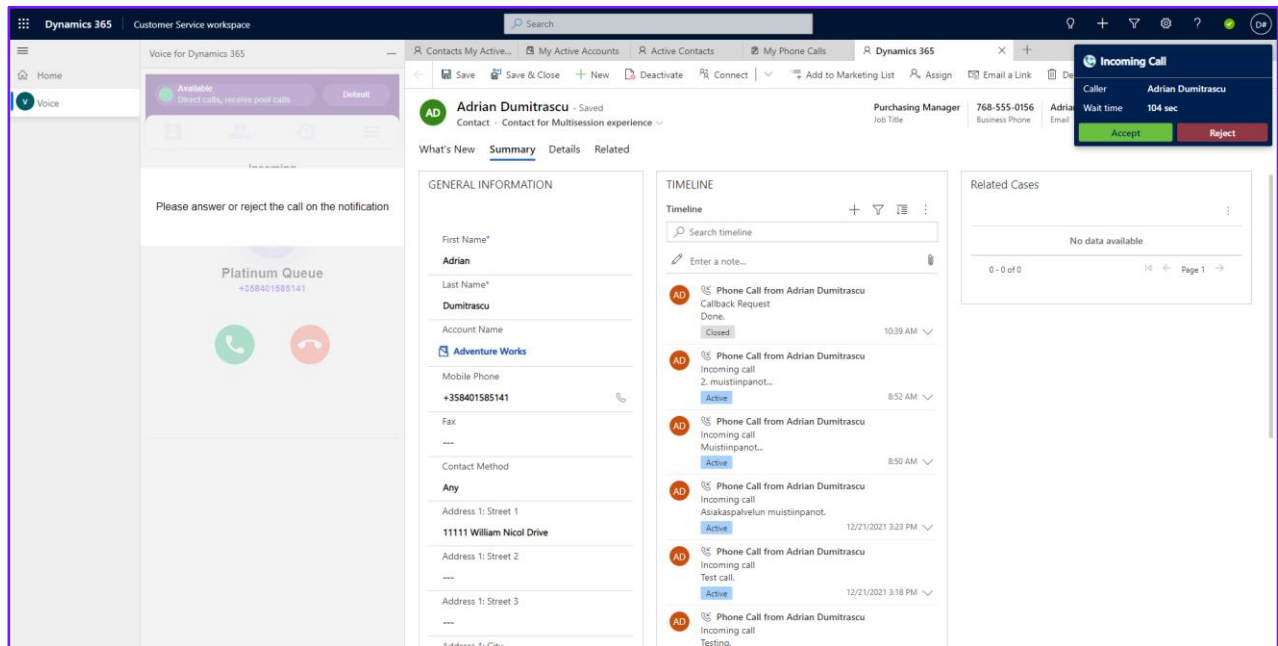
4) Voice for Dynamics 365 web phone is used for controlling phone calls, managing voice channel availability status and caller phone numbers.

Important notes:

- Voice for Dynamics 365 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 Voice for Dynamics 365 web phone continues functioning as normal.
- If you refresh the whole browser view / tab, the Voice for Dynamics 365 web Phone logs out and then logs in again. Active phone call is also disconnected and no incoming calls can be received if you refresh the whole browser view / tab.



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



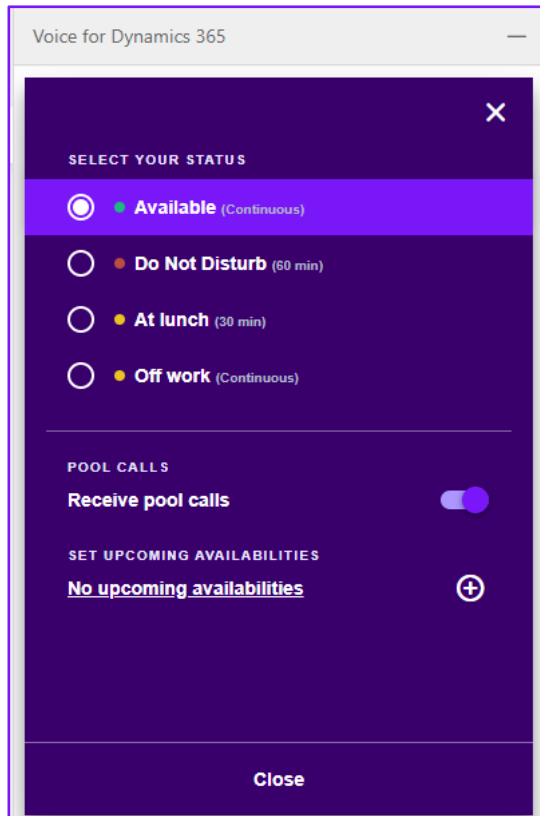
CIF version 2.0 (Omnichannel for Customer Service, Customer Service Workspace, Communication panel on the left side)

## 2 Availability Management

Enreach Cloud voice service typically includes customer specific availability statuses, but they always follow the status types described in this chapter. User controls available statuses via Voice for Browser web phone. Depending on Enreach Cloud 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



## 2 Voice for Dynamics 365 Web Phone

Web browser based softphone supported in Chrome browser.

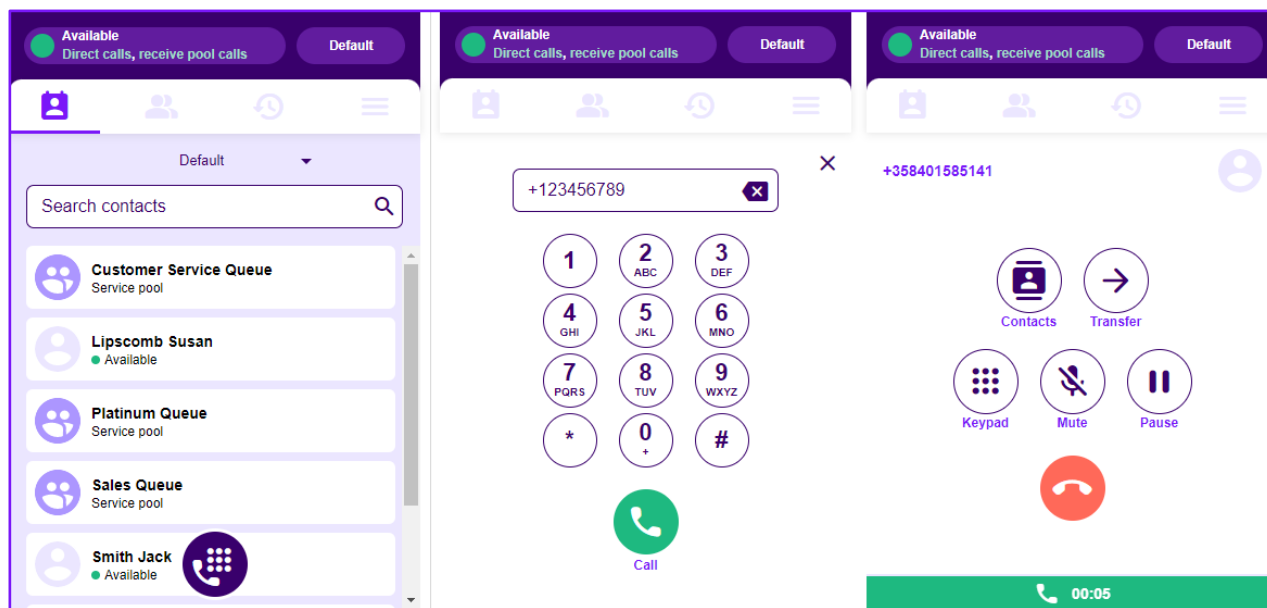
General functionality:

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

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

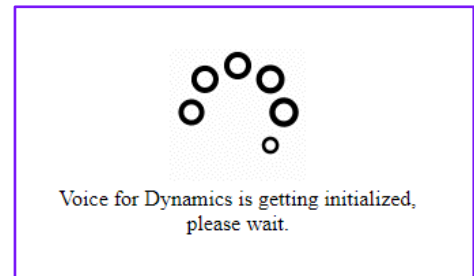
More detailed instructions via separate Voice for Browser user guide.

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



### 3 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.

Webphone is already active in another window

[See less](#)

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

## 2. Phone Workflows

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

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

### 2.1 Phonenumber Activity – Phone Workflow

#### 2.1.1 Inbound call – Single identified customer

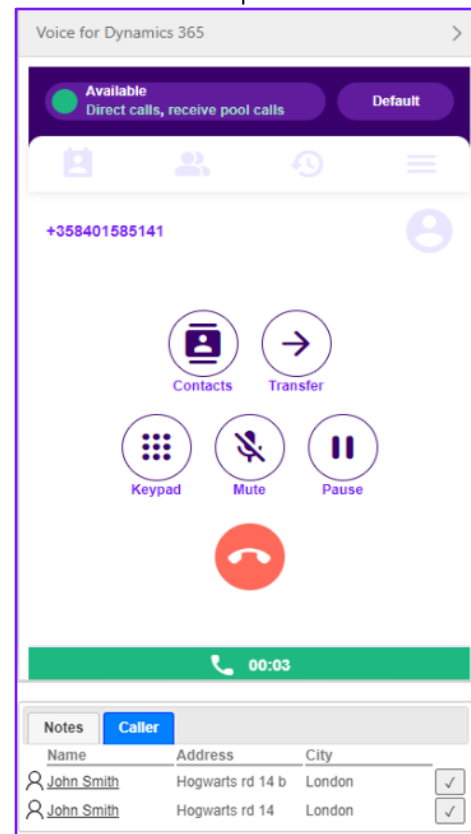
1. Phone call rings on web phone
  - a. Voice panel is forced to maximized mode
  - b. Contact card is opened in the main area
    - i. If there is unsaved record on the agent's table – no action will be taken. Contact card will be opened when user answers the call



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

## 3. Phonenumber 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 Voice for Dynamics 365 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 Enreach'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 Synchronization in Voice for Dynamics 365 (Enterprise Calls)

Enables phone call activity creation in D365, which were not already done and created by Voice for Dynamics 365 embedded webphone. Main use case is customer calls answered/made in another Enreach Cloud voice endpoint e.g. Mobile and Voice for Teams phone calls.

Phone Call activity creation happens automatically for Dynamics 365 users that have Enreach email address and id set in Voice 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.

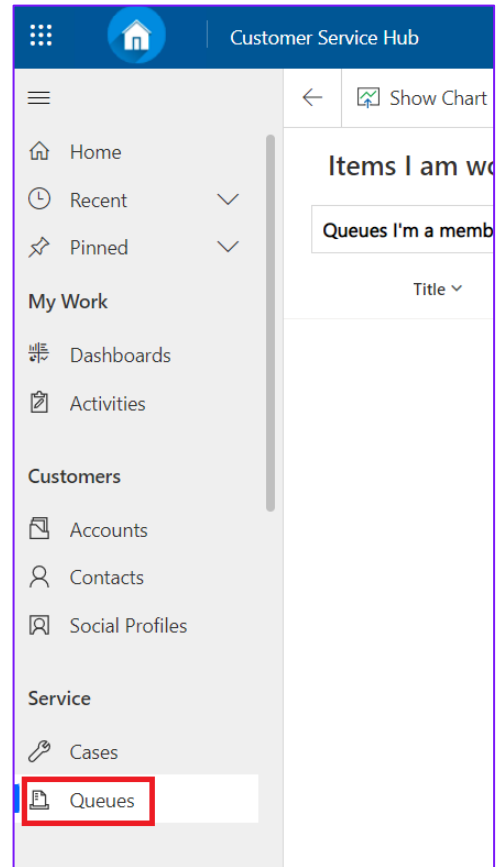
Configuration is described in separate Voice for Dynamics 365- Configuration guide for admins.

## 5. Callbacks

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

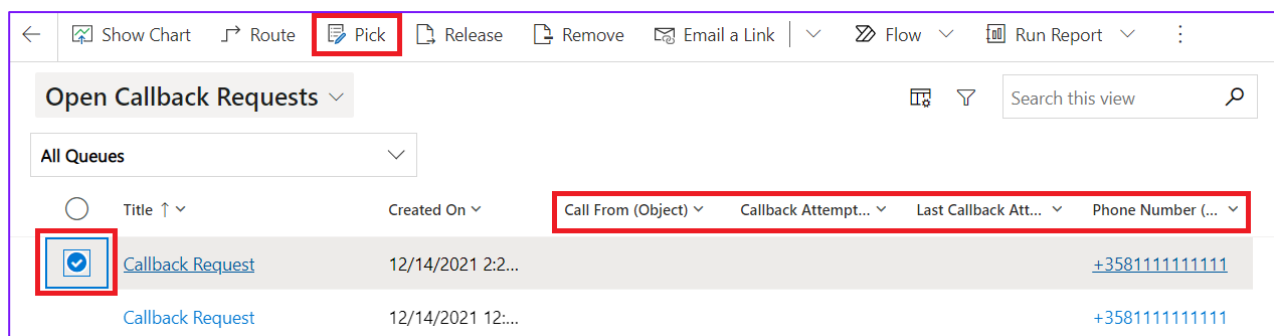
- Integration can be activated on Enreach Cloud callback list per D365 queue basis. Configuration is described in separate Voice for D365 - Configuration guide for admins.
- As soon as customer leaves callback on Enreach Cloud side, information is fetched to D365 and created as D365 Phone Call activity.
- Timespan is configurable and webjob is continuous 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 Enreach Cloud 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 Voice for Dynamics 365 functionality brings added value for callback handling as agents can use Click-to-dial for outbound calls from automatically created phone call activities.



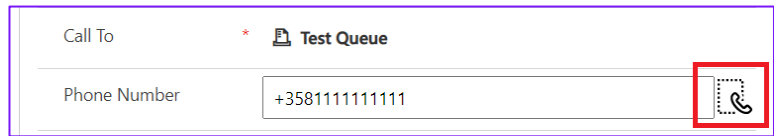
Users can see the list of open callback requests by navigating to Queue Item view, e.g. by clicking *Queues* menu on the left within *Customer Service Hub*

app and then selecting *Open Callback Requests* view. The user can – amongst other details – see for each callback request the number of callback attempts, date and time of last attempt and the number the callback request arrived from. Also, if a contact or account exists in CRM, a reference to the contact/account is added to the callback request.



A user can pick a callback request for handling by selecting the item (first column) and then clicking *Pick* on the command bar at the top. Picking an item is not mandatory to be able to make the callback, but helps to avoid conflicts between users.

The user opens the callback request by clicking on the item. Callback is carried out by clicking the button next to the phone number the callback request arrived from. See chapter 6 for details on click-to-dial functionality.



After the callback attempt, a phone call is created automatically to record the fact that an attempt was made. All attempts can be seen on callback request form.

**Callback Request** - Saved Normal Priority | --- Due | Open Status | BeneVoice ApiUser Owner

Phone Call · Voice for D365 - Phone Call

Phone Call Callbacks Related

🔒 Callback Attempts 5

Refresh < > Call

Created On	Created By	Call Progress Result	Description
12/10/2021 3:58 PM	László Péntes	Not Answered	
12/10/2021 12:32 PM	László Péntes	Not Answered	
12/10/2021 12:30 PM	László Péntes	Not Answered	
12/10/2021 12:30 PM	László Péntes	Not Answered	

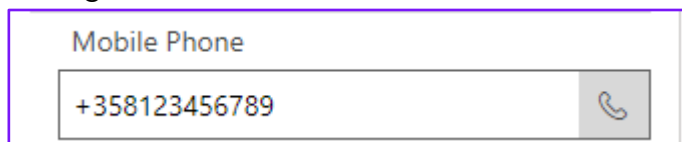
1 / 2

The user can also make a callback attempt by clicking the *Call* button above the grid of callback attempts.

## 6. Click-to-Dial

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

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



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

## 7. Enreach Cloud Management – general use cases

### 7.1 Voice Service Pool Management

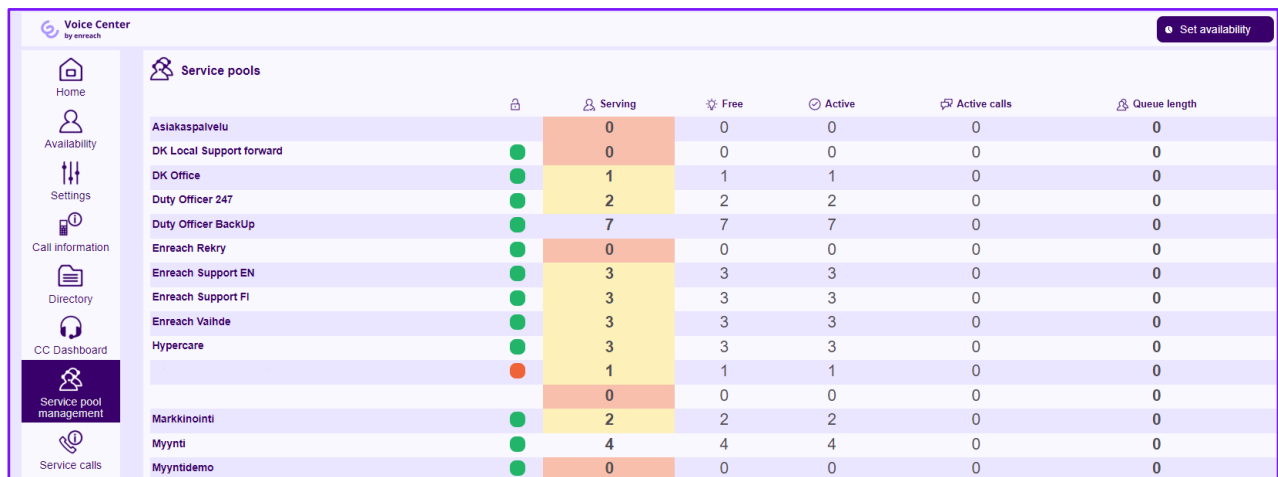
Queue management can be handled flexible from different endpoints.

Management capabilities require BeneCloud Group Manager / Supervisor rights.

- Voice Center by Enreach  
<https://discover.benedesk.com>
- Voice for Android & iOS by Enreach  
<https://play.google.com/store/apps/details?id=com.benemen.beneapp&hl=en>  
<https://apps.apple.com/fi/app/beneapp/id989797121?l=en>

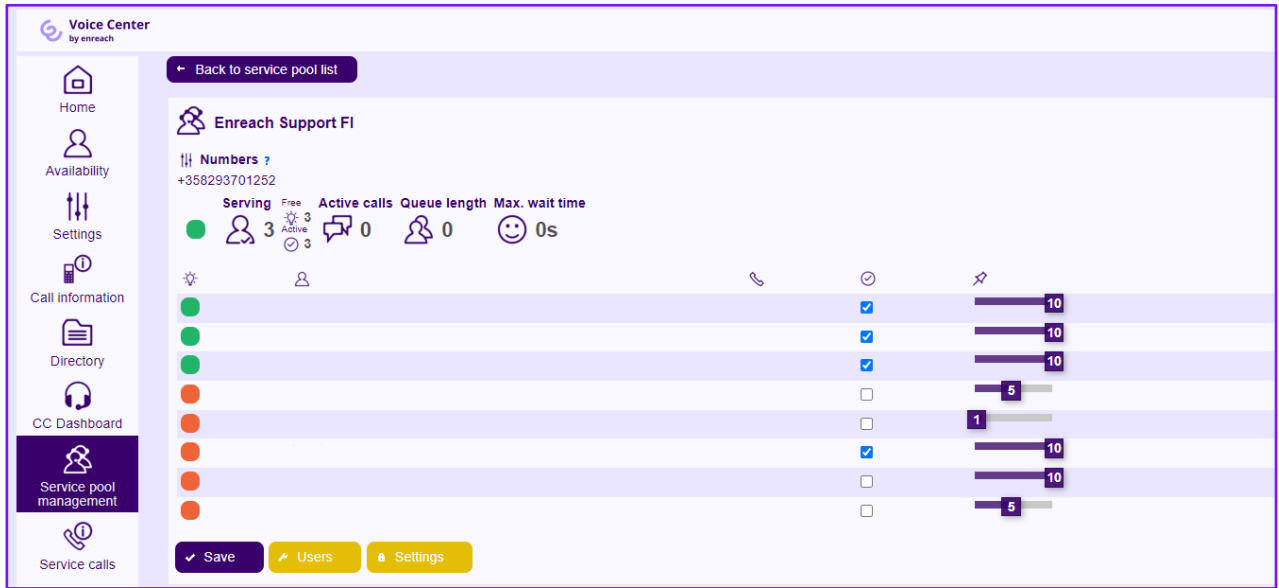
### 7.2 Voice Center by Enreach

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



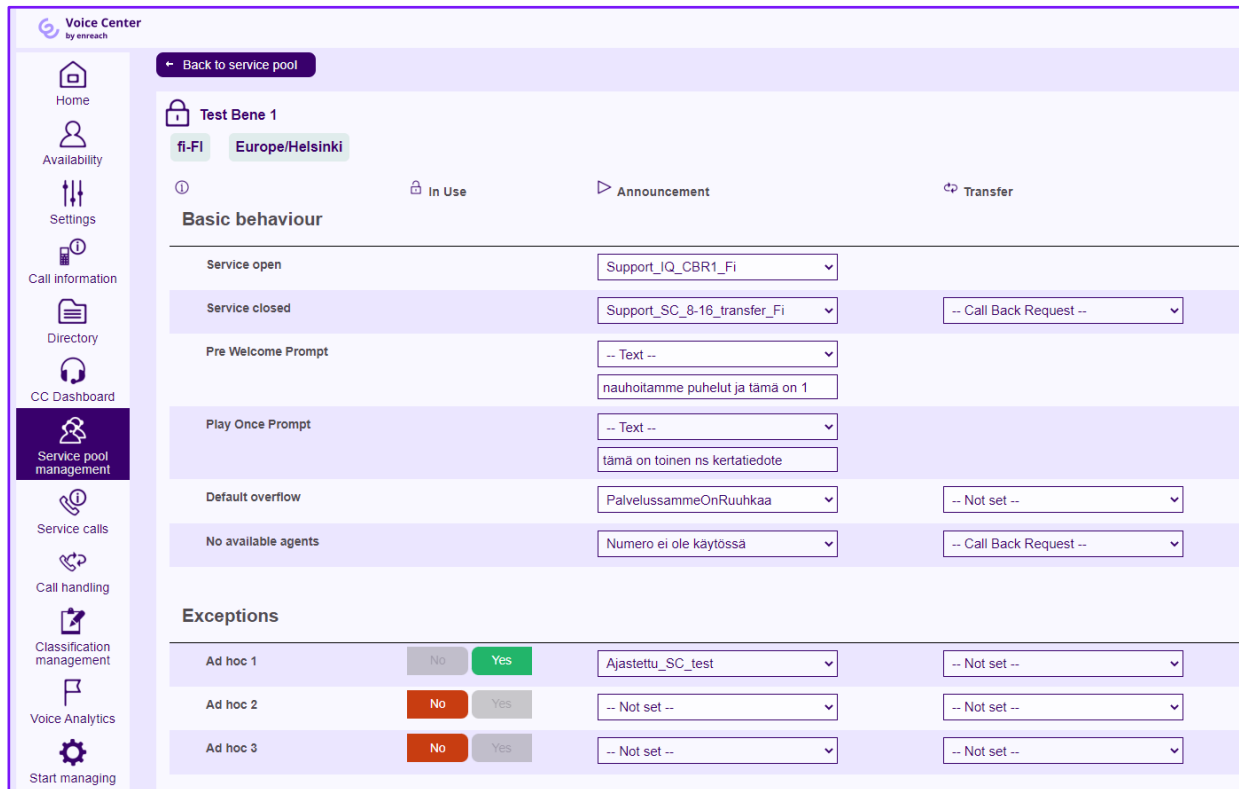
	🔒	👤 Serving	🕒 Free	🟢 Active	📞 Active calls	📏 Queue length
Asiakaspalvelu		0	0	0	0	0
DK Local Support forward	🟢	0	0	0	0	0
DK Office	🟢	1	1	1	0	0
Duty Officer 247	🟢	2	2	2	0	0
Duty Officer BackUp	🟢	7	7	7	0	0
Enreach Rekry	🟢	0	0	0	0	0
Enreach Support EN	🟢	3	3	3	0	0
Enreach Support FI	🟢	3	3	3	0	0
Enreach Vaihdde	🟢	3	3	3	0	0
Hypercare	🟢	3	3	3	0	0
	🔴	1	1	1	0	0
		0	0	0	0	0
Markkinointi	🟢	2	2	2	0	0
Myynti	🟢	4	4	4	0	0
Myyntidemo	🟢	0	0	0	0	0

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.



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





The screenshot shows the 'Voice Center' interface for 'Test Bene 1' in the 'fi-FI' region and 'Europe/Helsinki' location. The interface is divided into a left sidebar with navigation options and a main content area for configuration.

**Navigation Sidebar:**

- Home
- Availability
- Settings
- Call information
- Directory
- CC Dashboard
- Service pool management** (Active)
- Service calls
- Call handling
- Classification management
- Voice Analytics
- Start managing

**Main Content Area:**

Back to service pool

Test Bene 1

fi-FI Europe/Helsinki

In Use Announcement Transfer

**Basic behaviour**

Service open	Support_IQ_CBR1_Fi	
Service closed	Support_SC_8-16_transfer_Fi	-- Call Back Request --
Pre Welcome Prompt	-- Text --	nauhoitamme puhelut ja tämä on 1
Play Once Prompt	-- Text --	tämä on toinen ns kertatiedote
Default overflow	PalvelussammeOnRuuhkaa	-- Not set --
No available agents	Numero ei ole käytössä	-- Call Back Request --

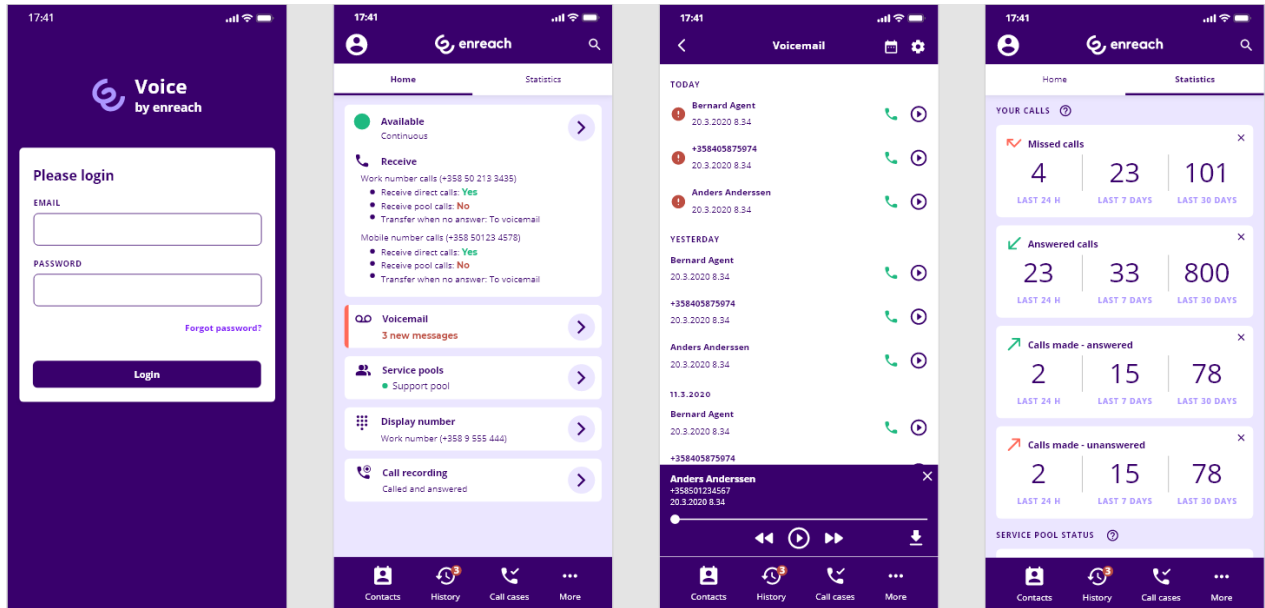
**Exceptions**

Ad hoc 1	No Yes	Ajastettu_SC_test	-- Not set --
Ad hoc 2	No Yes	-- Not set --	-- Not set --
Ad hoc 3	No Yes	-- Not set --	-- Not set --

## 8. Voice for Android & iOS by Enreach

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

Voice by Enreach App 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.

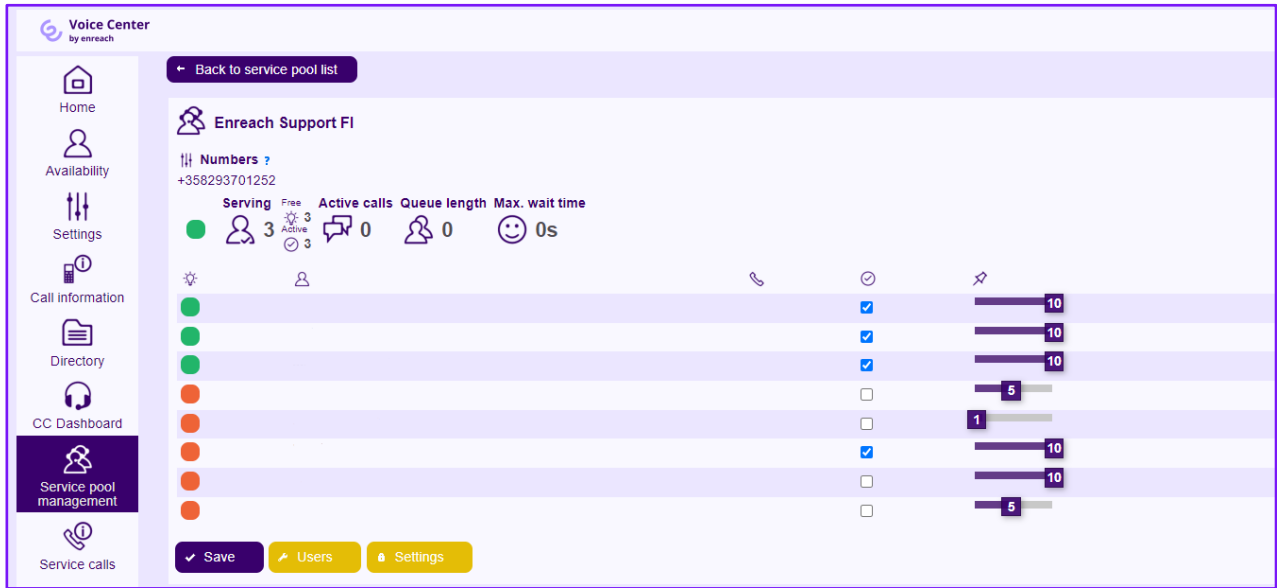


## 9. Reporting

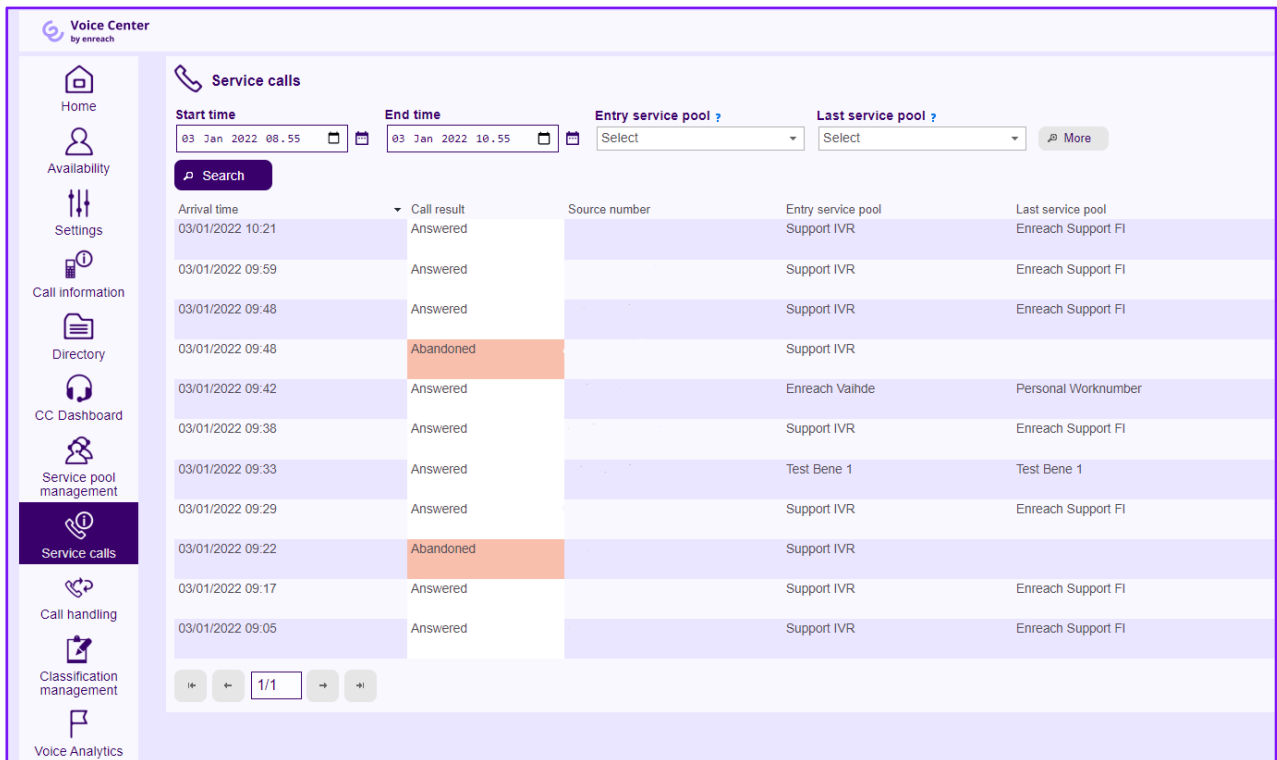
### 9.1 Real Time Monitoring Dashboard

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

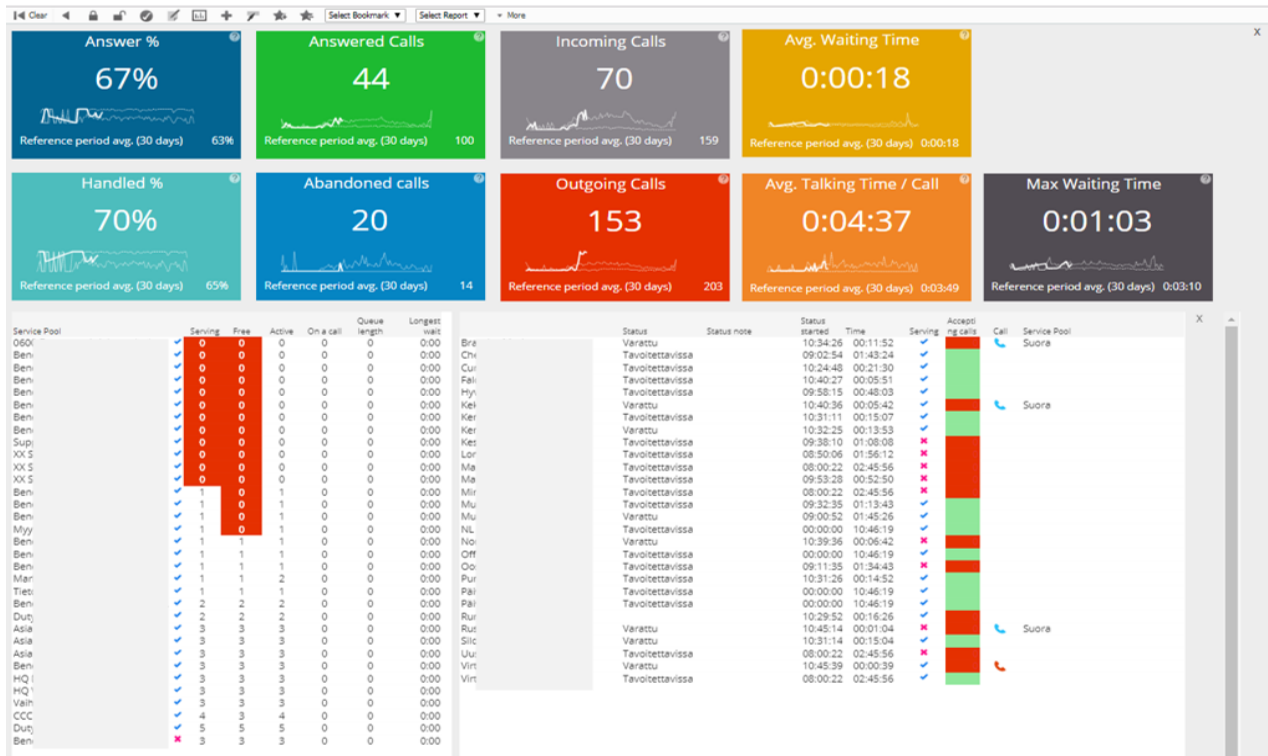
Service pools	🔒	👤 Serving	🌟 Free	🕒 Active	📞 Active calls	📏 Queue length
Asiakaspalvelu		0	0	0	0	0
DK Local Support forward	🟢	0	0	0	0	0
DK Office	🟢	1	1	1	0	0
Duty Officer 247	🟢	2	2	2	0	0
Duty Officer BackUp	🟢	7	7	7	0	0
Enreach Rekry	🟢	0	0	0	0	0
Enreach Support EN	🟢	3	3	3	0	0
Enreach Support FI	🟢	3	3	3	0	0
Enreach Vaihde	🟢	3	3	3	0	0
Hypercare	🟢	3	3	3	0	0
	🟠	1	1	1	0	0
		0	0	0	0	0
Markkinointi	🟢	2	2	2	0	0
Myynti	🟢	4	4	4	0	0
Myyntidemo	🟢	0	0	0	0	0



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



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

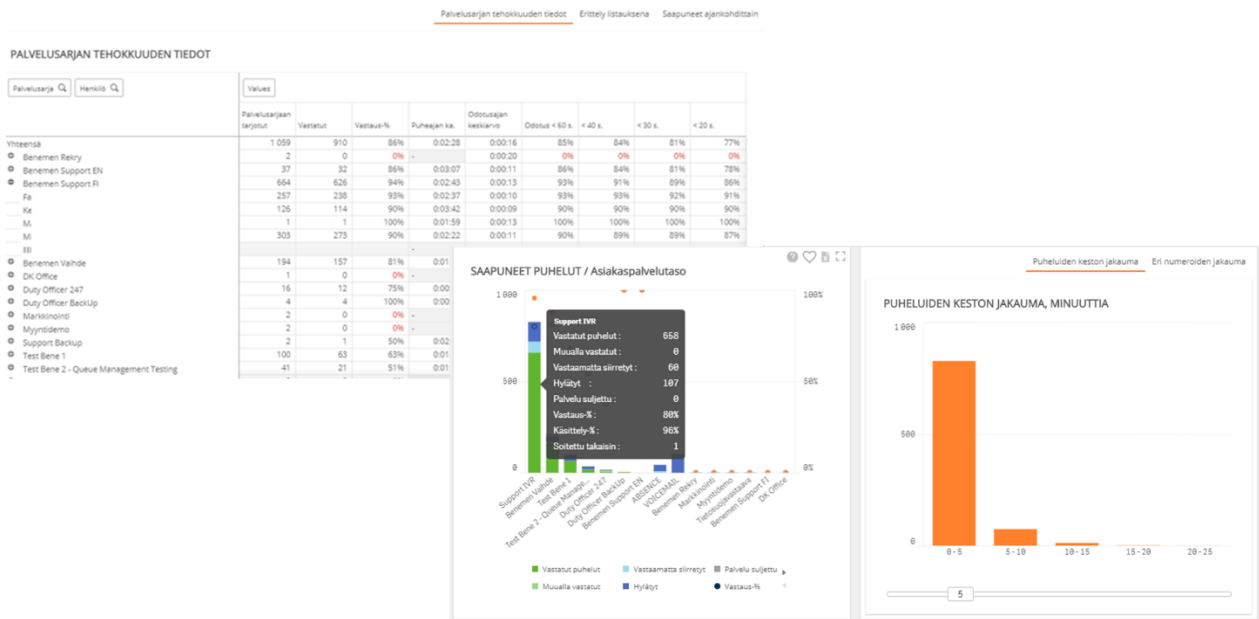


## 9.2 Reporting

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

### Enreach Reports 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 Voice Center by Enreach 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.