Voice for Dynamics 365 by Enreach V 1.3





Voice for Dynamics 365 Configuration Guide



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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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Setting	, Ö													
Busin	ess	Cust	tomization	Syst	em					Exte	nsions	Appl	ication	í.
	Business Manageme	++-	Customizations	20	Administration	\mathbb{N}	Email Configuration	2	Organization Insights		Data Imports	-	Apps	
D	Templates		Californi	•	Security	-0	Activity Feeds Confi			•	Targets	34 - J		
0	Product Catalog	D	Microsoft AppSource	٦,	Data Management		Activity Feeds Rules			++	Vendors			
10	Service Manageme				System Jobs	D	Dynamics 365 App f			•	Customer Care Mod			
1	Mobile Offline	3	Solutions History	Г.	Document Manage	۵,	Data Export			÷	Account domains			
¢þ	Sync Error			1	Auditing	Ŷ	Sales Insights			•	Cases Invoiced			
0	Sites Create new sites or office i	ocations	where service operations take p	iace. Add	and remove resources, change	site infor	nation, or delete sites.					1		Subjects Manage the subject
2	Currencies Add new currencies or cha	nge the e	schange rates for existing curre	nces									B	Connection Rol Create, edit, and dev
3	Relationship Roles Manage the standard lace	is users ci	in apply when they define relat	orship ro	es between accounts, contacts,	and opp	ortunities.							Automatic Reco Create and manage
Ŀ	Rollup Queries Go to your list of Rolup Q	Lieries the	it you can use to gather data at	org é tuoc	up of related records.								in	LinkedIn Sales Manage settings rela

	🔒 🧼 Setti	ngs 🗸 Business Management			ۍ م	+ 7	🛛 🔅 🖉
ines	s Management	AppSource Apps for [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	Categories AI + Machine Learning 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.	IT & Management Tools Marketing Operations & Supply Chain	$\star \star \star \star \star \star (4)$			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





Micro

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

Figure 2 Agree to Terms

Micro	osoft Dyna	mics 365				
\N/el	come					
V V CI	CONIC					
INSTANCES	UPDATES SERVICE	HEALTH BACKU	P & RESTORE APPI	LICATIONS		
Manage	your solutions	;				
(N		alutions				
	nanaye your so	JULIOIIS				
Col	act a professed on	lution to mono	an op colorted in	stones Bananan (2	
Sen	ect a preierred so	nution to mana	ge on selected ir	istance. Benemen (Ју	
SOL	UTION NAME	VERSION	AVAILABLE UNTIL	STATUS		
AI B	Builder for SharePoint F	. 2020.7.16.3	1/1/2050	Not installed	Channel API Integrat	
And	chor solution for Dual	1.0.22	1/1/2050	Not installed	enumer Arr megruu.	
Cha	nnel API Integration Fr	. 9.1.0.420	1/1/2050	Installation pending	Please wait while installation starts. The take a few minuter	nis may
Con	mmon Data Service Bas	9.2.2006.10	1/1/2050	Not installed	Bring your communication channels and bu	uild
Con	nmon Data Service Star.	9.2.2006.10	1/1/2050	Not installed	immersive experience with Dynamics 365	
Con	ntextual Help Base	1.0.0.12	1/1/2050	Installed	Created by: Microsoft	20
Con	e Service Scheduling	9.0.20103.1007	1/1/2050	Not installed	Learn more	0.
Crm	n Hub	1.0.20170908.55	1/1/2050	Upgrade available		
Cus	tomer Service Team M	9.0.20094.3061	1/1/2050	Not installed		
Data	a Export Service for Dy	1.0.0.0	1/1/2021	Installed		
Dyn	namics 365 Connector f	. 1.13.10034.1003	1/1/2030	Not installed		
Dyn	namics 365 Customer I	0.7.19	1/31/2029	Not installed		
Dyn	namics 365 Customer V	2.0.0.8	1/1/2050	Upgrade available		
Dyn	namics 365 Finance and	. 2.0.777.493	1/1/2050	Not installed		
Dyn	namics 365 for Marketi	1.35,10067,1044	1/1/2030	Not installed		

Figure 3 Install Channel Integration API

 $[4 \mathrel{\triangleleft} \flat \mathrel{\rightarrowtail} \flat]$



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	name for this application (this can be changed later).
Voice for Dynamics 36	4
Supported account	types
who can use this applic	ation of access this API?
Accounts in this or	ganizational directory only (Oy PL-PRO Ltd only - Single tenant)
Accounts in any or	ganizational directory (Any Azure AD directory - Multitenant)
Accounts in any or	ganizational directory (Any Azure AD directory - Multitenant) and persona
	accounts only
Help me choose	
Redirect URI (optio	nal)
We'll return the authent	ication response to this URI after successfully authenticating the user. Prov
changed later, but a val	ue is required for most authentication scenarios.
Select a platform	✓ e.g. https://example.com/auth
- 1	HORKING ON BORG INTOGRATO GOULONDE ANDE ANDE ANDE TROM OUTSIGO VOUR

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
	Ē (
Overview	<u>_</u>
🗳 Quickstart	Di
💉 Integration assistant	Ar
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



Req	uest API permissions
< All A	Pis
	Dynamics CRM
What	type of permissions does your application require?
Dele Your	gated permissions application needs to access the API as the signed-in user.
Select	permissions
🔎 Sta	art typing a permission to filter these results
P	remission
VP	lermissions (1)
	user_impersonation ① Access Common Data Service as organization users
	-
-	

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
	u 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
(1) Quidetet	🚍 Branding	Application (client) ID : 60c7836d-5fb8-437a-91de-fd57e
Quickstart	Authentication	Object ID : de59a6cc-51d2-4d08-b0f6-2b1bee6fb354
 Integration assistant 	Automation	Directory (tenant) ID : 39ab371b-feea-49d5-aa37-8c2ec9a9c26c
milegration assistant	T 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.

PowerShell 🗸 🛛 🖒	? ◎ []; 凸 {} [];
PS /home/laszlo> C PS /home/laszlo> \$ PS /home/laszlo> \$	onnect-AzureAD startDate = Get-Date endDate = \$startDate.AddYears(100) addussernatd1 = Nay AzureADDarlicationDescymrdCoodential ObjectId de
PS /home/las2lo> > PS /home/laszlo> W CustomKeyIdentifie	rite-Output \$aadAppsecret01
EndDate KeyId StartDate	: 12/28/2121 11:59:49 AM : : 12/28/2021 11:59:40 AM
Value	3+0WmTWi3wQHSfbPg0cmCiC3r8s1u7Xy181TcpHwv7k=



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 Secu	urity Details Previous Versions	
0.	DeploymentPackage.dll	
Type of file:	Application extension (.dll)	
Opens with:	Unknown application	Change
Location:	C:\Dev Install\DeploymentPackage (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 Hidden	Advanced
Security:	This file came from another compute and might be blocked to help protec this computer.	Unblock

Figure 12 Deployment Package properties



Package Deployer for Microsoft Dynamics CRM	_	×
Ht Microsoft Duramics CDM		
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		
		l



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

Figure 14 Insert your company information



🚈 Package Deployer	for Microsoft Dynamics CRM					_		×
Connect to I	Microsoft Dynamics CRM							
Deployment Type:	On-premises Office 365							
Sign in as cu	Sign in as current user							
✓ Display list of available organizations								
 Obspray its of available organizations Show Advanced 								
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



Mu 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

4 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, clic	k Next.					
		Previo	ous		Next	

Figure 18 Ready to Install



4	Voice	_		×				
	Read	ling Voice for D365 Customizations Installer Configuration						
	Status:	Ready						
	Organi	zation : unqd74bf34e78674714afda9368f34b4						
	View lo	g file						
	Ø	Import configuration loaded.						
	ø	Found 2 solutions.						
	Found the solution: Voice for D365 by Enreach, version: 1.1.7.7 (Managed)							
	I. Dependency Found : Dependency on solution ChannelAPIIntegrationFramework found on target environment							
	Ø	2. Dependency Found : Dependency on solution msdynce_AppCommon found on target environment						
	Ø	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

)rgan	ization : unqd74bf34e78674714afda9368f34b4	
0	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.	
Ø	Parse Complete	
0	Beginning Import To CRM Importing 5 entities - 37 records	
О	Running Schema Validation	

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
<		>	
	Fi	inish	

Figure 21 Installation Complete

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

1.4 Configure application user in D365

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

- Navigate to Dynamics 365 Settings and User management.
- PLEASE NOTE: Change the list view to Application users and choose: New (upper left in the ribbon)





→ C 🌲	benemen.crm4.dynamics.com/main.aspx?set	ttingsonly=true#402733200		
	👌 🗸 Settings 🗸 Security	g	Q	3
JEW 🏯 PROMO	ote to admin 🛛 🖘 email a link 🗍 👻 🧬 FL	ow 👻 🦻 🖓 RUN REPORT 👻 📓 EXCEL TEMPLATES 👻 🕼 EXPORT TO EXCEL 💷 👼 IMPORT DATA	• ***	
-¤ Applica	ation Users ×		Search for	· records
🗆 Full I	Name 🛧	Application I Azure AD Obj Application I		
Busir	ness Application Platform Service account	475226c6-02 1df4108e-4f4 https://servic		
Micro	rosoft Forms Pro	19dd5b37-d1 2ac20c21-e1 19dd5b37-d1		
Powe	er Apps Checker Application	c9299480-c1 cec46591-78 https://test.a		
RI Aş	ppUser	dc431514-d1 e661af1b-789 https://crmri		
Supe	er Cards	e61d067b-25 c19a0717-70 e61d067b-25		
VOC	Push Service	19c49fe8-933 6aca5b3c-a9 https://crms2		

Figure 22 Application users

• When a new user form appears, change first the form to USER: APPLICATION USER to be able to enter the application user details.



• Add the same application id to the *Application ID* field that was created in Azure App registration. Fill in fields in User information section and click save.

Account Information	
User Name	•
Application ID *	60c7836d-5fb8-437a-91de-fd57673fd2f



Figure 23 New application user



If application user setup is done correctly, values should appear to Application ID URI and Azure AD Object ID fields.

🗰 Dynami	cs 365	Settings ~	Security # Vo	pice for Dynamic	>
Web client experi	ience for securi	y settings is being dep	recated Please use	e the Power Platform admi	in center to leve
O DYNSCREEN	CONNECT	▼ m DELETE	PROCESS -	Repertive and the second secon	™ <mark>×</mark> REJECT
	K	USER : APP # Voice	for Dynar	• nics 365 •≡	
	\rm \rm Th	e information provideo	l in this form is vie	wable by the entire orga	nization.
	⊿ S	ummary			
	A	ccount Information			
	U	ser Name	VoiceforDy	namics365_60c7836d	I-5fb8-4:
	A	oplication ID *	● 60c7836d-5	5fb8-437a-91de-fd57	'673fd2fi
	A	oplication ID URI	● 60c7836d-5	5fb8-437a-91de-fd57	'673fd2fi
	A	zure AD Object ID	ac2a81e82-0)221-4b09-930e-1d8	01ab3cd
	U	ser Information			
	Fu	III Name *	# Voice for	Dynamics 365	
	Pr	imary Email	VoiceforDy	namics365_60c7836	d-5fb8-4

Figure 24 Application user saved

• Finally, give the application user a security role Voice ApiUser.



Role Name	Business Unit	
App Prome User		
Basic User		
🗌 Benemen Basic		
Voice ApiUser		
Voice User		
BizQAApp		
Bot Author		
Bot Contributor		
Bot Contributor		

Figure 25 Add a security role

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

Open Dynamics and open Channel Integration Framework App:



-	7						
4	pps						ez ×
Hom Rece Pinne	 ✓ Search my apps ✓ Published Apps (25) 				+ Create new App	🖔 Refresh	∲ Filter
Case	Þ	7			5		
Acco Cont	Dynamics 365 —Benemen Provides access to the full suite of capabilities, including administration	2nd Line Support	 Benemen Sales	 BeneVoice Configurator BeneVoice configuration settings	Billing		
	Microsoft Dynamics 365 12.11.2020	Default Publisher for benemen 9.4.2019 UNIFIED INTERFACE	Default Publisher for benemen 25.102019 UNIFIED INTERFACE	Benemen UNIFIED INTERFACE	Default Publisher for benemen 14.6.2019 UNIFIED INTERFACE		
	\$ ⁰	v	v		benemen		
	Channel Integration Fra Bring your communication channels and build immersive experience with	Customer Service Hub A focused, interactive experience for managing your customer service.	Customer Service worksp Multi-session Customer Service with Productivity tools	 Deployment	Dynamics 365 App for O Provides access to Dynamics 365 App for Outlook for enabled users.		
	Microsoft Dynamics 365	Default Publisher for benemen 19.1.2019 UNIFIED INTERFACE	Microsoft Dynamics 365	Default Publisher for benemen 17.2.2019 UNIFIED INTERFACE	Default Publisher for benemen 27.8.2018 UNIFIED INTERFACE		
				•	Ę		
	Dynamics 365 Portals	IT Support	Numsi	 Operator Info	Portal		-

Figure 26 Channel Integration Framework App

This configuration is used for customers not using the multisession capabilities and do not use Omnichannel licensing in their Dynamics 365 environment.



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



	Channe	el Integra	ation Frame	ework										Q	Ø	Q	+	∇	ø	?
		÷	🗟 Save	😭 Save	e & Close	+ New	<table-cell> Deactivate</table-cell>	Delete	e 🖒 Refresh	🖾 Email a Link	≫ Flow ∨	¢2	Word Te	emplates	5 ~	💷 Ru	in Repor	t ~		
ome cent	\sim	ber _{Chan}	nel Provid	er																
nned	\sim	Cha	nnel Prov	ider Cor	figurati	on														
l Provider Iration			Name		* b	enevoice		Selec	t Unified Inte	rface Apps for th	e Channel		Sele	ct the F	Roles f	for the	Chann	el		
annel Providers			Label		* В	ene Voice		En	ter text here	Support ×	~		E	Benemen E	Basic ×	Beneme	en Support	t ×		~
			Channel U	JRL	* h	ttps://app-be	en-webp 🕀													
			Enable Ou Communi	itbound cation	Ŷ	25														
			Channel C	Order	* 1															
			API Versio	'n	1	0														
			Trusted Do	omain	h	ttps://app-be	en-webp 🕀													
			Custom Pa	arameters		-														

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.

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1.5.2 Users

1.5.2.1 Update enreach Cloud User ID

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Callback	Microsoft Dynamics 365 12/29/2021	MicrosoftDynamics	MicrosoftDynamics	Default Publisher for benemen 8.12.2021	MicrosoftDynamics	MicrosoftDynamics	MicrosoftDynamics	
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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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Users Settings	# AriaMdlExporter	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.

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	Patrik Vaskivuori		Benemen Dev	Benemen Dev QA Specialist		a0c957dc-0051-e711-80c9-0050568	abigail.dickens@do	omain.com			
	Olli Kojonen			Benemen Dev			724fe824-034f-e911-80d4-0050568 webrtc.user1@domain.com				
			Igor Shevchenko		Benemen Dev			2a3b5779-15ef-e911-80de-0050568			

- 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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• 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

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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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🛱 Enreach Quei	es		OutgoingDirectCallSub	ject		Outgoing direct call		string	value, subject for outgoing	phone calls.	
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			ProcessServiceCallsUna	answered		False		bool v	alue, defines weather servio	e unanswered calls should be retr	
			RunInDebugMode			False		bool v	alue. When set true, start d	ate of phone calls retrieved from b	

Figure 33 Phonecall Sync Settings

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Figure 34 DefaultCRMAssignee

• **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.

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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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.
- Age Time Unit: a unit of the time-period, can be Days, Hours, Minutes. Controls the size of time window when querying callbacks from Enreach API.
- Callback Age: number value of defined periods in the previous field.
- 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

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 10 minutes. In QA and DEV environments it may be longer, several hours or even days.

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

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).

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

- 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

1.5.5 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 rightside corner of the App)



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Figure 36 Open in App Designer

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



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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. 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)



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Service pool	
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Smith Jack • Available	

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