



DYNAMICS 365 SELF HOSTING BOTS

A Bot for CRM org to know Lead, Opportunity and Case details

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Overview

The Chat Bot solution can be used for any Dynamics 365 system and providing capability to filter and view cases, opportunities or views available.

Chat Bot feature benefits:

- Case and its information (which includes All Cases, My Active Cases, Active Cases, Individual Case).
- Opportunities associated for an account and products associated with opportunity.
- This section outlines the steps to be performed by a System Administrator to make Solution available to the end users.

Note: Please visit our GitHub [repository](#) to get to know about our latest features of chatbot.

This solution, built on Dynamics 365, seamlessly works with Dynamics CRM 2016 and later.

CRM Chat Bot Configuration

Pre-requisites:

1. Administrator/ User who's configuring Chat Bot should be a valid Azure AD user
2. The user who is configuring the Chat Bot should have contributor license in Azure.

Least Permissions required for users to access "Chat Bot" area in sitemap

This section describes providing minimal security settings permissions required for users with roles other than System Admin to Configure Chatbot.

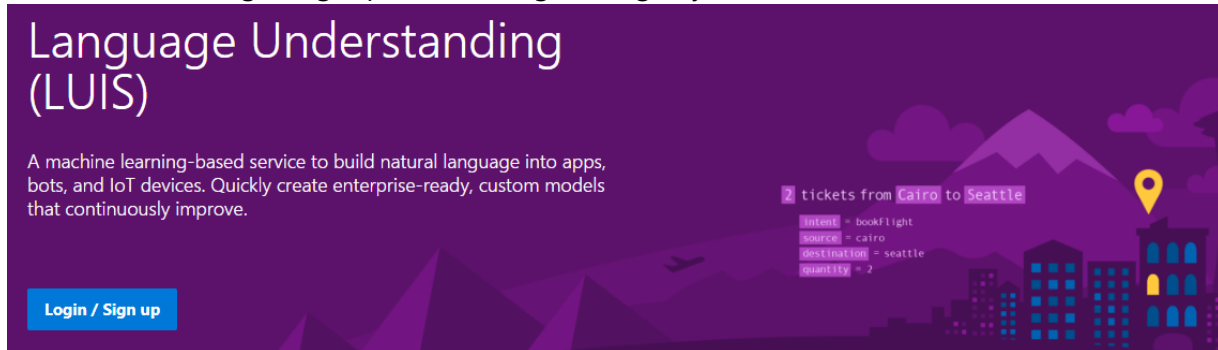
Users should be having **Read Permissions** (Least Permissions) on **Dynamic Bot Setup** to access configuration steps to set up Chat Bot. The steps to provide the minimal security settings needed on the custom entities are:

1. Login to CRM and go to **Settings | Security Roles | Select A Role**

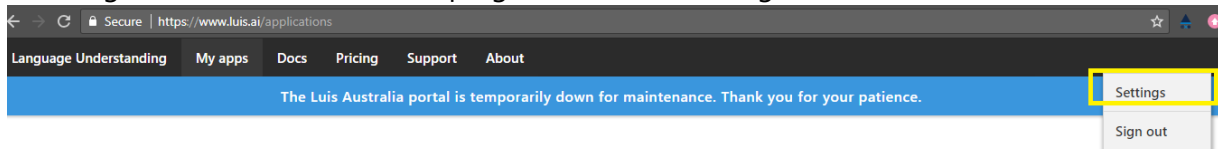
Go to "**Custom Entities**" tab, select **Dynamic Bot Setup**, and provide **Read Permissions**.

Deployment Scripts Setup

1. Download the latest Deployment Scripts by clicking here or cloning our [Github Repository](#). If you have downloaded the zip, extract it.
2. Go to [LUIS](#) and Login/Signup. You can login using any Live account



3. After login, click on Your name (top right corner) -> Settings



My Apps

4. Copy the Authoring Key and keep it handy. We will needed in next step.

Microsoft Converged App Creation

This section provides information on creating Microsoft Converged App.

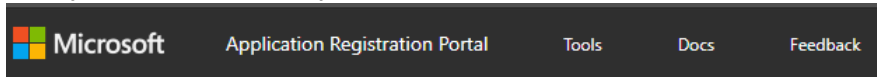
1. Go to [Application Registration](#) Portal and login with your live account.
2. Beside section "**Converged Applications**" click on Add an app.

My applications

Converged applications [Learn More](#)

Add an app

3. Give your application any name and click Create.



Register your application

Application Name

Guided Setup

 Let us help you get started

By proceeding, you agree to the [Microsoft Platform Policies](#)

4. In next screen, copy **Application Id** and keep it handy. We required in the next step.

TestApp Registration

[Click here for help integrating your application with Microsoft.](#)

This application will be registered in the Azure Active Directory instance used to

Properties

Name

Application Id

f24f5dd4-e444-4da7-82ba-649ace72e4d0

Application Secrets

5. Click on **Generate New Password** and copy the generated password. We will need it in next step.

Note: The password will be displayed only once. Make sure you have noted it down somewhere.

TestApp Registration

[Click here for help integrating your application with Microsoft.](#)

This application will be registered in the Azure Active Directory instance

Properties

Name

TestApp

Application Id

f24f5dd4-e444-4da7-82ba-649ace72e4d0

Application Secrets

Generate New Password

Generate New Key Pair

Upload Public Key

6. Click on **Ok** to close the generated password window.
7. Click on **Save** button at bottom of the page.

Bot Registration

This section describes Bot registration, where you need to fill all the required fields available in the form.

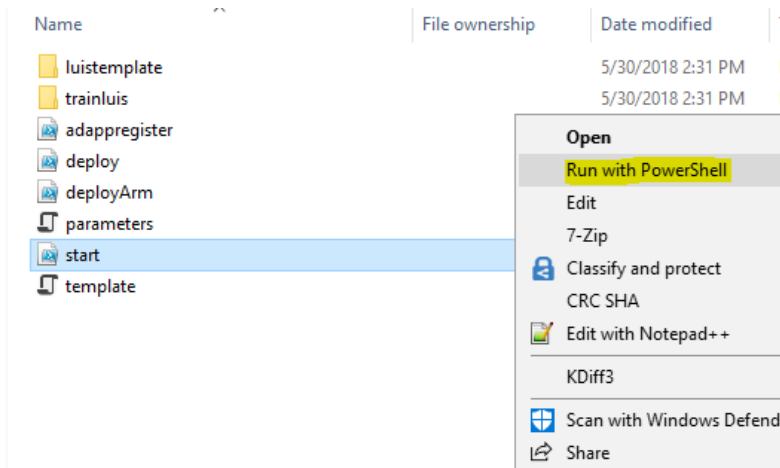
Fill the form with relevant details. You will also need **LUIS Authoring Key** (from Step 1), **Microsoft Converged App ID** and **Password** (from step 2)

Once filled, click on **Save** to generate a download link. Click on the **generated link** to download a PowerShell file and save it in deploy folder where you extracted Deployment Script files (in Step 1).

Bot Installation

This section describes the Bot installation process.

1. Go to the extracted zip folder where you downloaded the PowerShell file from last step.
2. Right click on the downloaded PowerShell file (**start.ps1**) and click Run with PowerShell. If asked to change policy or install packages type "Y" and press Enter.

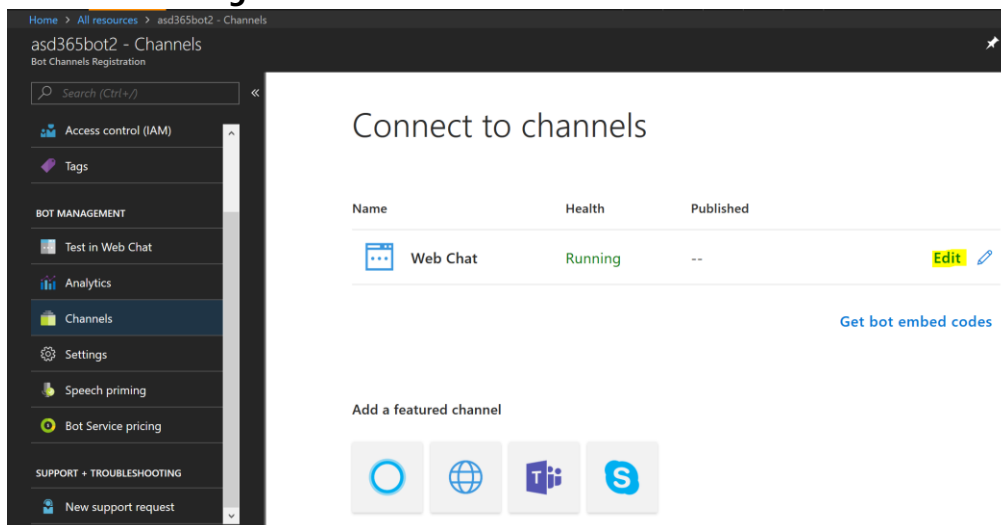


3. The script will automatically create azure resources, deploy the bot and train a LUIS app. You will be prompted to login for total of 3 times.
4. For the first and second prompt, enter credentials of the user who has "**Contributor**" access in your Azure Subscription. For the third prompt, enter credentials of a CRM Admin.
5. The following azure resources will be created. You can view this by going to [Azure Portal](#)
 - a. Azure Web App
 - b. Azure Bot Service
 - c. Azure Key Vault
 - d. Azure Cognitive Service Account (LUIS)
 - e. Application Insight

LUIS subscription

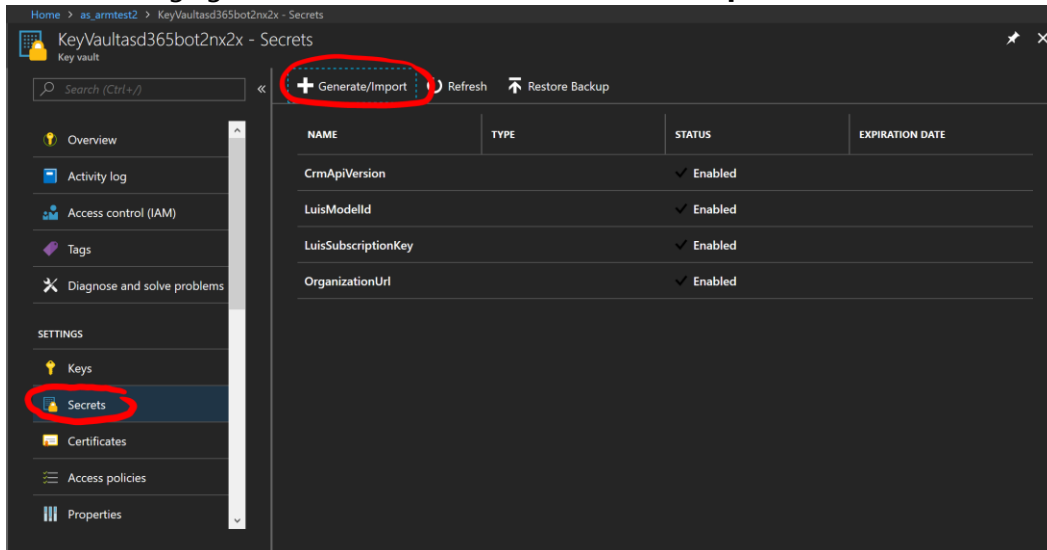
This section provides information on subscription of LUIS in Azure portal.

1. Go to Azure Portal Resource Groups in Azure portal and search for the Resource name which was given in Bot Registration.
2. Open resource group and go to Bot Channels Registration.
3. Under **Bot Management** click on **Channels** and then click on **Edit** on Webchat channel.

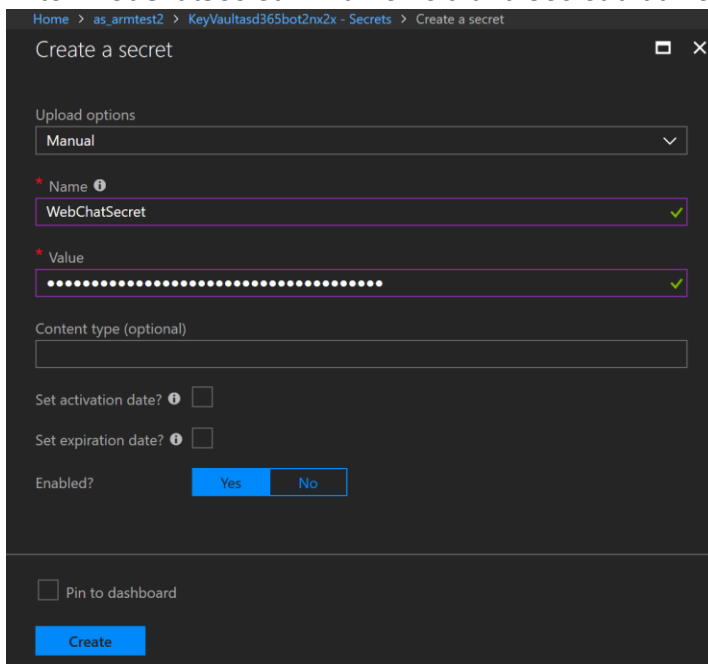


4. Click on **Show** button under **Secret Keys**. The content of textbox will become visible.

- Copy the secret key. (Make sure you copy entire secret key.)
- Go back to your resource group and select the **Key Vault** of the app.
- Under Settings go to **Secrets** and click on **Generate/Import**.



- Enter WebChatSecret in Name field and Secret that we copied before in Value field.



- Click on **Create**.
- Go to [LUIS](#) and open d365bot app.
- Click on **Publish** button available in the menu and under section Resources and Keys click on **Add Key**.
- From the list select and click **Add Key**.
- Click on **Train** button on top right.
- Once training completes, click on **Publish** to production slot.

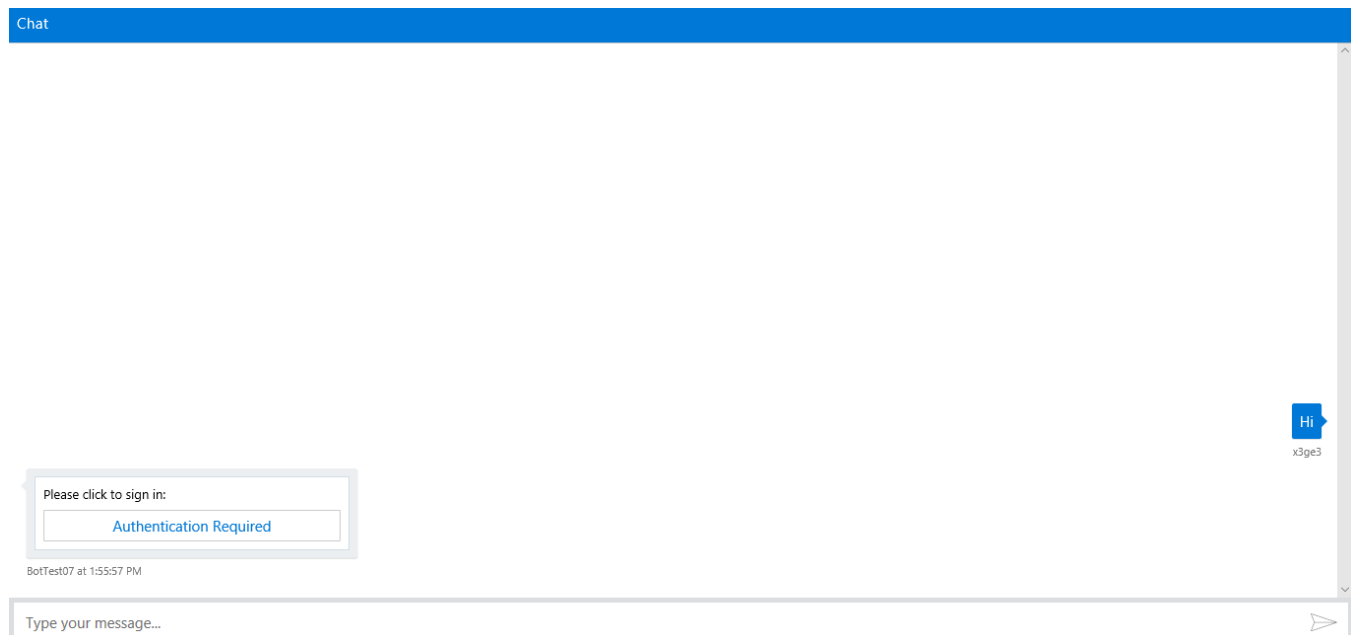
With this Chat Bot registration and installation completes. You can now visit your bot site and explore the feature...

Note:

1. Currently we see some issues with IE browser to support this Chatbot solution. We are working on this and visit our GitHub [repository](#) for update.
2. Please reach out [here](#) to report for any issues related to the Chatbot.

Functionality Verification

Launch the BOT in Edge browser



Authenticate yourself with AAD using generated code

BotTest07

Please paste back the number you received in your authentication screen.

BotTest07

Thanks Suresh Guduru. You are now logged in.

BotTest07

Hey there.

BotTest07

I can search and display cases, opportunities or views.
- **show me case having id CAS-1234** where *CAS-1234* is case number
- **what are opportunities from Walmart** where *Walmart* is account name
- **get all active cases**
- **what is status of Walmart deal** where *Walmart* is account name

BotTest07 at 1:59:31 PM

Type your message...

User can get the date by giving sample commands like 'get all active cases'

The screenshot shows a chat window with a blue header labeled 'Chat'. The bot's response includes a list of commands and a selection menu. The user's input 'get all active cases' is shown in a blue bubble on the right. The bot's response is:

BotTest07

Hey there.

BotTest07

I can search and display cases, opportunities or views.
- **show me case having id CAS-1234** where *CAS-1234* is case number
- **what are opportunities from Walmart** where *Walmart* is account name
- **get all active cases**
- **what is status of Walmart deal** where *Walmart* is account name

BotTest07

get all active cases

x3ge3

I found 3 views having name similar to "all active incident". Which one would you like to choose?

- All Cases
- My Active Cases
- Active Cases
- None of the above

BotTest07 at 2:01:58 PM

Type your message...

BOT will display the views from configured CRM org for the Case entity.