



Orlo & Dynamics365 CE

INTEGRATION GUIDE



**harness human
connection**

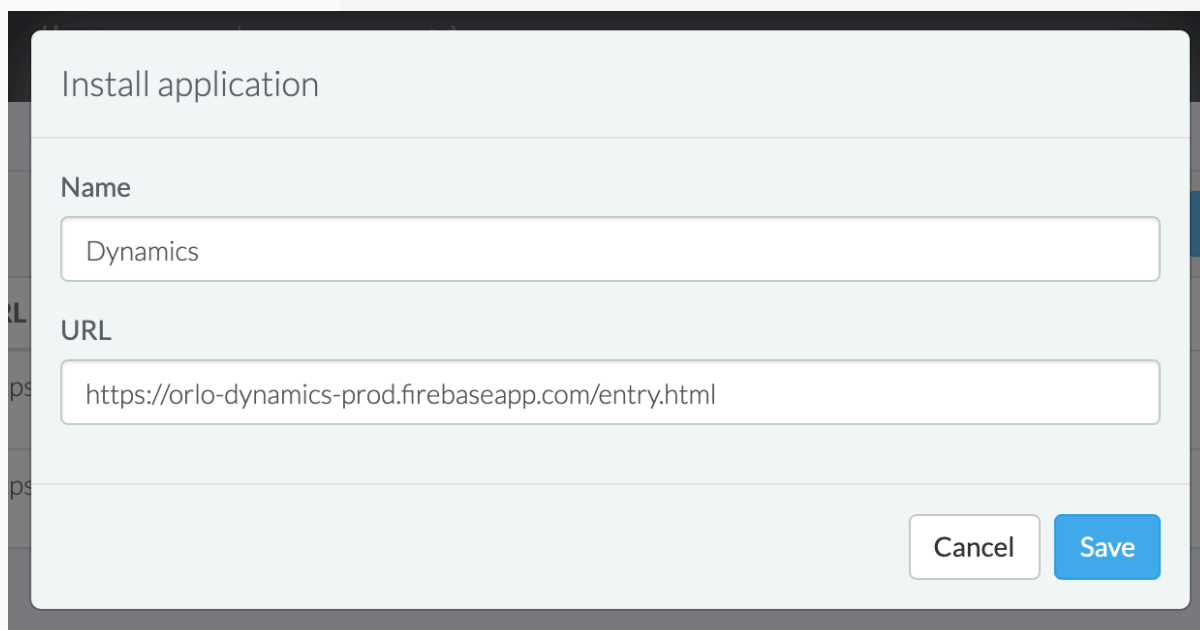
create powerful online experiences and emotional
connections with your customers

Installing the Dynamics Plugin for Orlo

The following guide is for customers using our hosted solution.

INSTALLING THE APPLICATION

While inside Orlo and logged into an account with the administer company permission click on the top right user icon and navigate to Settings -> Manage apps -> Create new. You should be met with the following popup.



Install application

Name

Dynamics

URL

https://orlo-dynamics-prod.firebaseio.com/entry.html

Cancel Save

Name the application and enter <https://orlo-dynamics-prod.firebaseio.com/entry.html> in the URL box

CONFIGURING AZURE

You should now see the application listed in the Manage apps screen. To enable Orlo to talk to your dynamics instance you must first set this up inside Azure.

Login to the Azure portal and navigate to Azure Active Directory -> App registrations -> select your app -> Authentication and add <https://orlo-dynamics-prod.firebaseio.com/> to redirect URIs. More information on this can be found [here](#).

CONNECTING TO DYNAMICS

Now you must connect your dynamics instance. Click on settings next to your application and you will be prompted to connect. This requires three pieces of information

- Tenant: This is usually found in the Azure portal inside the active directory under the config settings for your dynamics instance e.g YOUR_COMPANY.onmicrosoft.com
- Client Id: This will be found in the same place as the Tenant

- **Crm Url:** This enables the integration to make the correct API calls to your instance. This is simply the URL you use to login to your dynamics via a web browser

Upon completing this information you should be able to proceed with using the integration.

CONFIGURING THE PLUGIN

Once you have successfully connected your instance through the Orlo Dynamics plugin you will be able to configure it to your needs. There are a few options of note.

Please select what type of profile you would like to link your Dynamics to

Contacts

Accounts

This option allows you to switch between linking a contact or account, this should be configured inline with how your dynamics instance is set up. If you find you are not seeing any profiles when searching inside the integration then switch this option.

Profile

Case

Please select what information to display for Profiles

Address3_UPSZone

CustomerTypeCode

DoNotBulkPostalMailName

ExchangeRate

Address3_Composite

Address2_Line1

ModifiedByExternalPartyName

Telephone3

Address2_City

Address3_Line2

The second option allows you to select what information is displayed on both the profile screen and the individual case screen inside the integration. There is no limit to the information that can be displayed.

Setting Up Orlo In D365 CE

Things you Need!

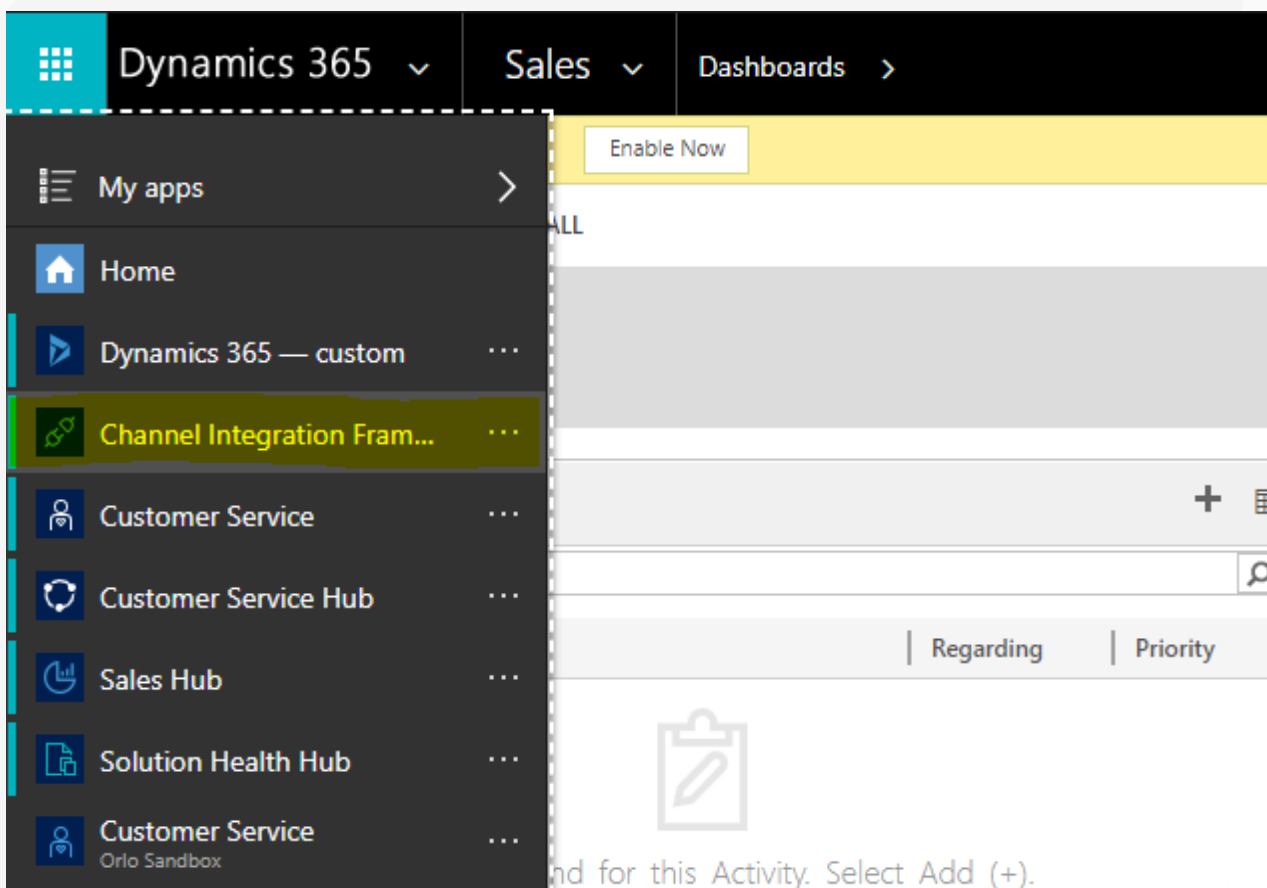
1. Orlo Login
2. Dynamics Login
3. Social Accounts added to Orlo

Step 1 - Set Up access to the Channel Integration Framework here:

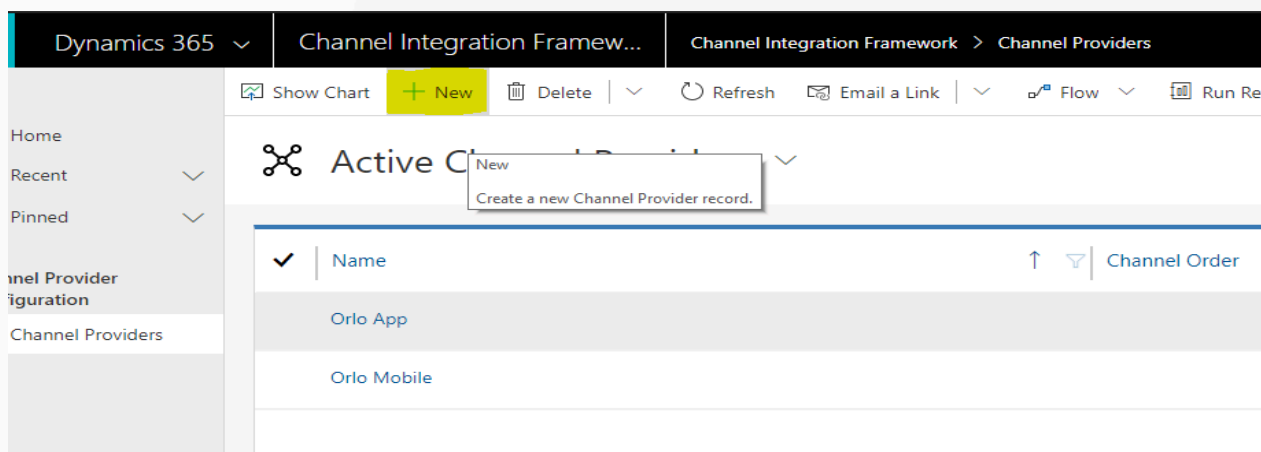
Follow Microsoft's guide for installing the Channel integration Framework to your instance here:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/channel-integration-framework/get-channel-integration-framework>

Step 2- Go to the Channel Integration Framework Application



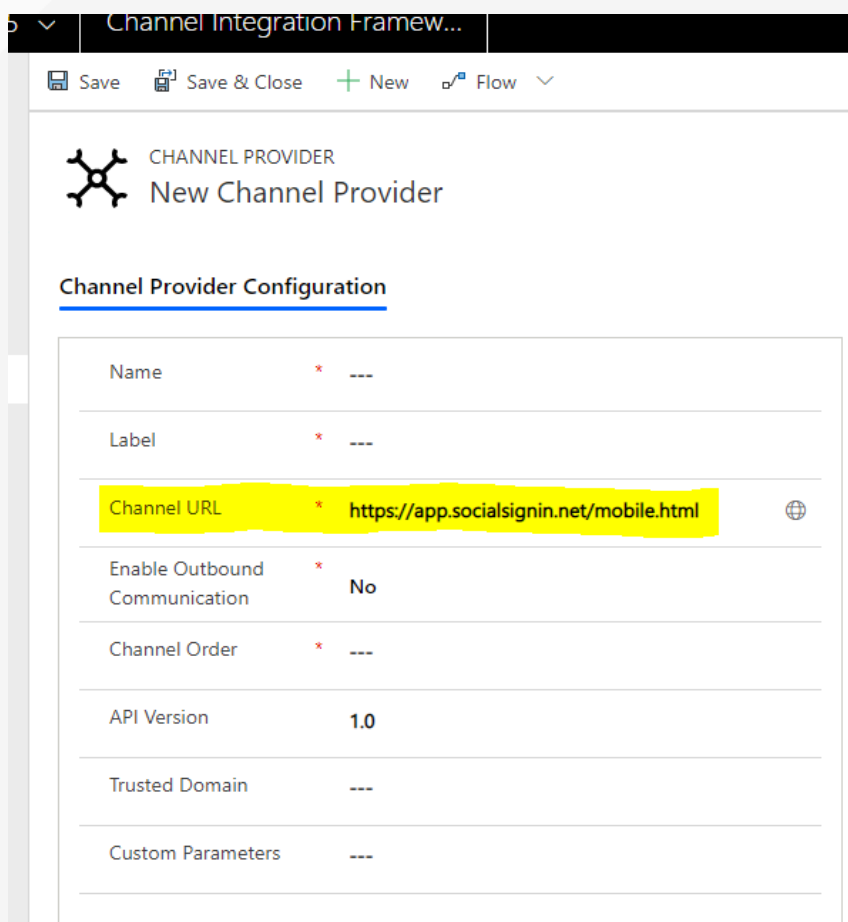
Step 3 - Create a new Channel



The screenshot shows the Dynamics 365 interface for the Channel Integration Framework. The breadcrumb navigation is 'Channel Integration Framework > Channel Providers'. The left-hand navigation pane includes 'Home', 'Recent', 'Pinned', 'Channel Provider Configuration', and 'Channel Providers'. The main area displays a table of channel providers with columns for 'Name' and 'Channel Order'. Two entries are visible: 'Orlo App' and 'Orlo Mobile'. A '+ New' button is highlighted in yellow, and a tooltip above it reads 'New' and 'Create a new Channel Provider record.'

Step 4 - Enter App URL

Enter details and put this link for the Channel URL (<https://app.socialsignin.net/mobile.html>):



The screenshot shows the 'New Channel Provider' configuration form. The title is 'CHANNEL PROVIDER New Channel Provider'. The form is titled 'Channel Provider Configuration' and contains the following fields:

| | | |
|-------------------------------|---|---|
| Name | * | --- |
| Label | * | --- |
| Channel URL | * | https://app.socialsignin.net/mobile.html |
| Enable Outbound Communication | * | No |
| Channel Order | * | --- |
| API Version | | 1.0 |
| Trusted Domain | | --- |
| Custom Parameters | | --- |

Step 5 - Save and close

Always Save your work!
