TeleSign Voice for D365 User Manual

Version 1.0.0.0

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1. Add Inbound Voice Calling to Dynamics 365 for Marketing to reach, engage & communicate with customers.

Enable the phone numbers being used for SMS outreach to receive inbound Voice Calls from your Dynamics 365 for Marketing implementation

- o Route and bridge voice calls from your users to the appropriate person or department
- o Track communication events with each of your users all in one place
- o [Complement your SMS communications](#) with Voice Calling

Maintain a global presence with a localized experience

- o Receive Voice calls globally, in more than 100 countries and territories and 25+ languages
- o Leverage TeleSign's network, which spans across 700+ high-quality, direct-to-carrier routes providing the highest availability, delivery and completion rates

Deliver differentiated and personalized customer experiences

- o Utilize a virtual phone number that can route to anyone within your organization
- o Record call events into a customer record each and every time you communicate with your user(s)

Drive Engagement towards your organization through Voice Calls

- o Use Virtual Numbers as publicly facing contact numbers
- o Run Inbound Voice Campaigns to drive engagement towards your organization
- o Increase conversion rates, customer retention and CSAT rates

About TeleSign

TeleSign connects and protects online experiences with sophisticated customer identity and engagement solutions. Through APIs that deliver user verification, data insights, and communications,

we solve today's unique customer challenges by bridging your business to the complex world of global telecommunications.

2. Solution Configuration

Once TeleSign Voice solution is installed from the AppSource, Dynamics 365 apps will show up on your screen. Click on TeleSign Voice application on three dots in the right corner. Go to manage roles to configure which roles have the right to see this application.
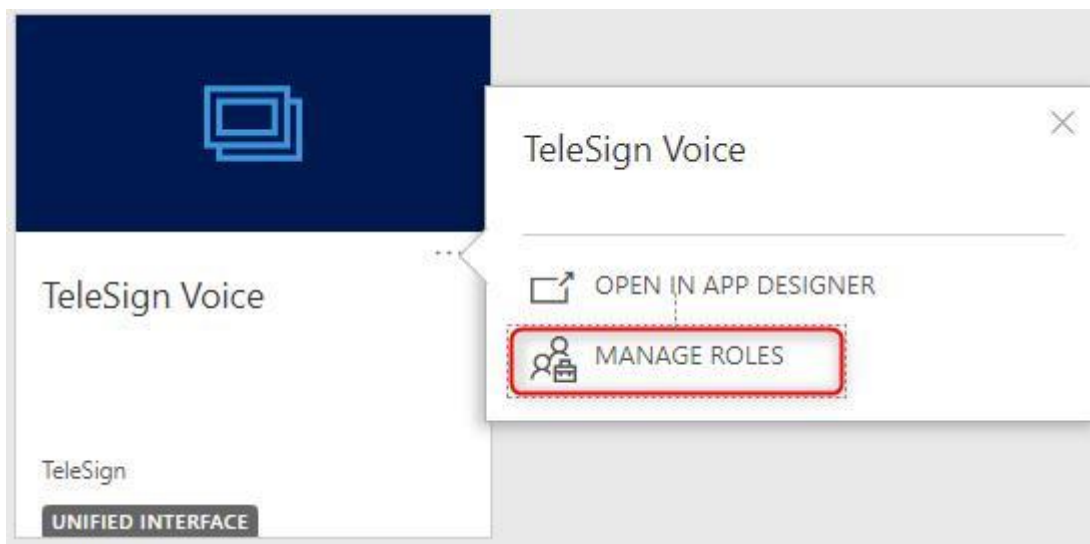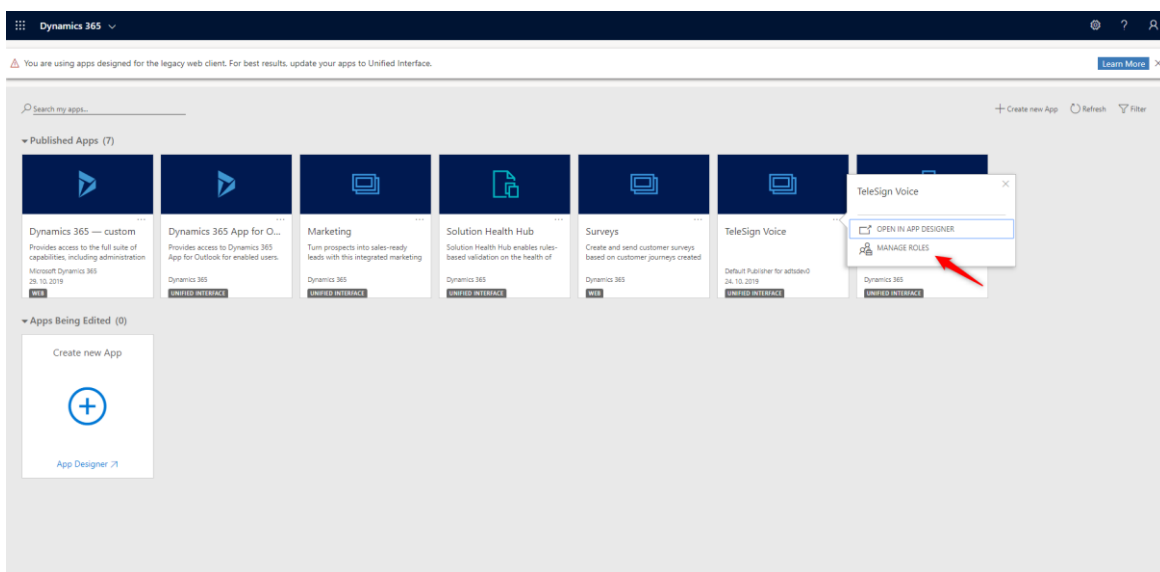

Figure 1 - TeleSign Voice Application

TeleSign Voice has predefined roles included:

- o   TeleSign Voice Administrator and

o TeleSign Voice User.

Figure 2 - Giving privileges for TeleSign Voice App

Add roles and click on button SAVE. Now only users that have these roles assigned can see the application.

⚠ IMPORTANT: Please note that only D365 users with previously described user roles assigned will be able to configure (TeleSign Voice Administrator) and use (TeleSign Voice User) TeleSign Voice application.

To assign security roles to D365 user please follow these instructions:

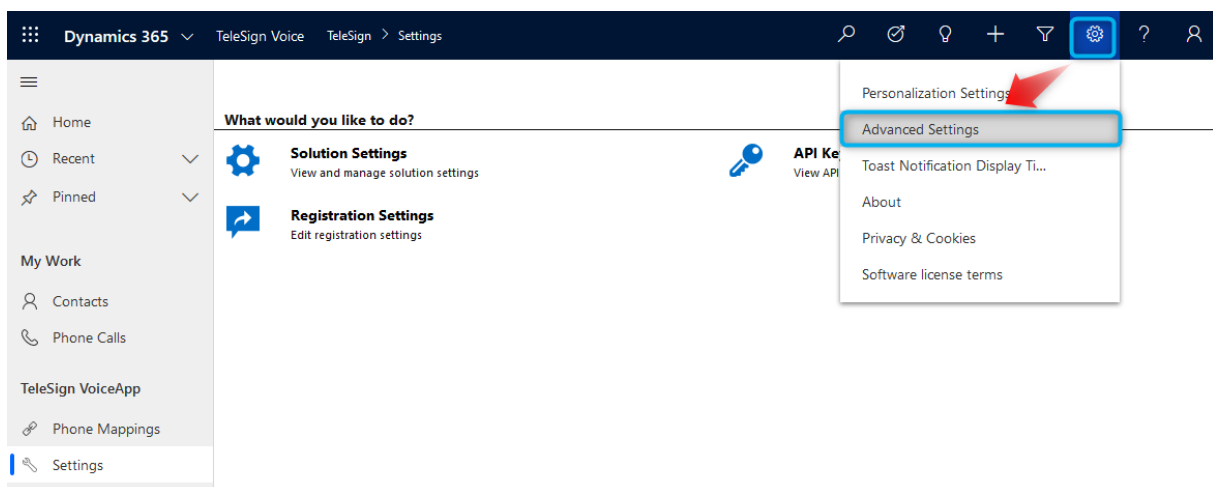- Click Settings button and then Advanced Settings.

Figure 3 - Navigation to advanced settings

- New tab will appear in your browser. Navigate to Settings and choose Security.
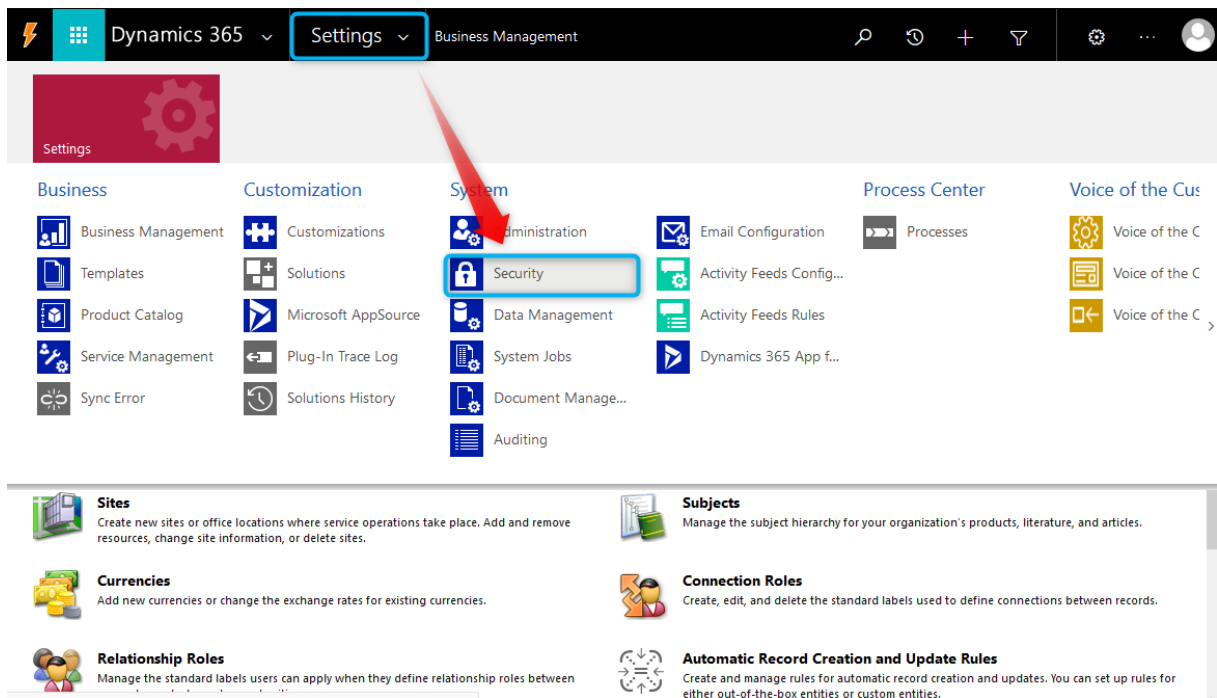

Figure 4 - Navigation to security settings
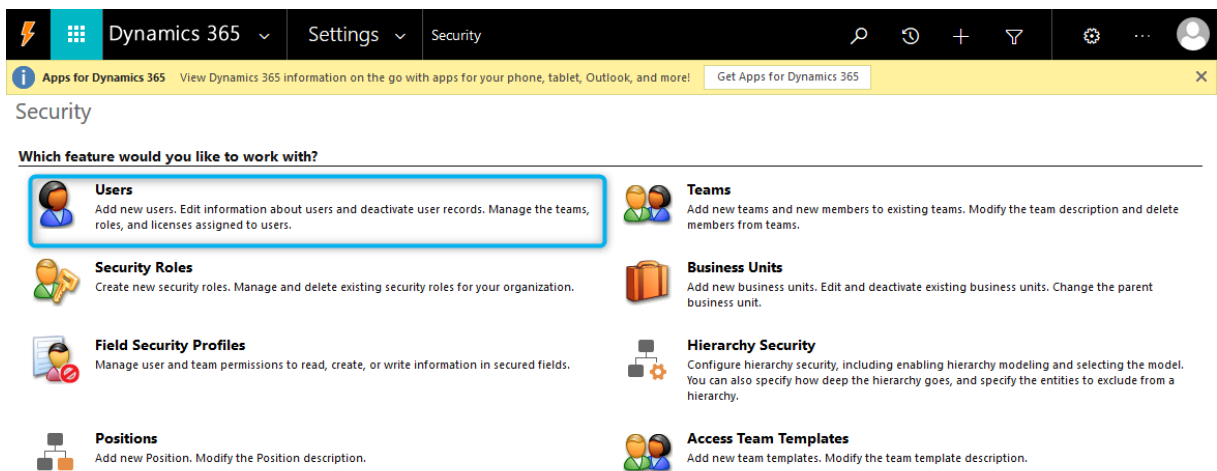
- Choose Users.

Figure 5 - Navigation to user administration

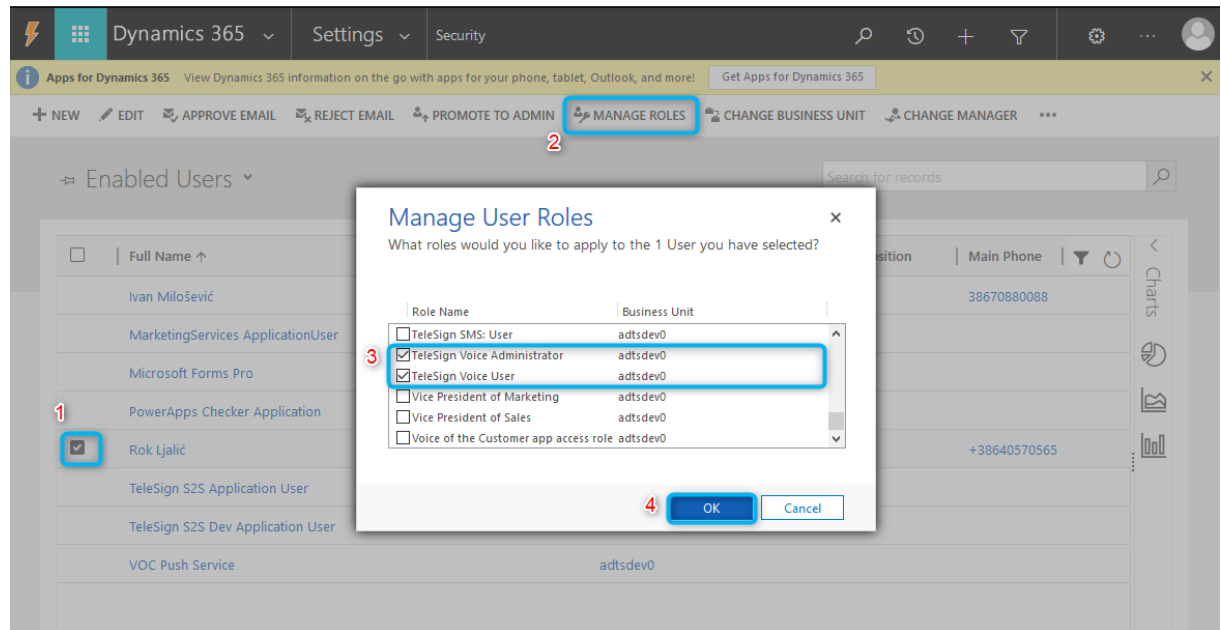- Choose a user(s) that need be assigned with the role

Figure 6 - D365 user role assignment

These two roles differentiate in privileges that they have for TeleSign Setting entity and API Key entity:

- o TeleSign Voice Administrator - can see and configure all entities

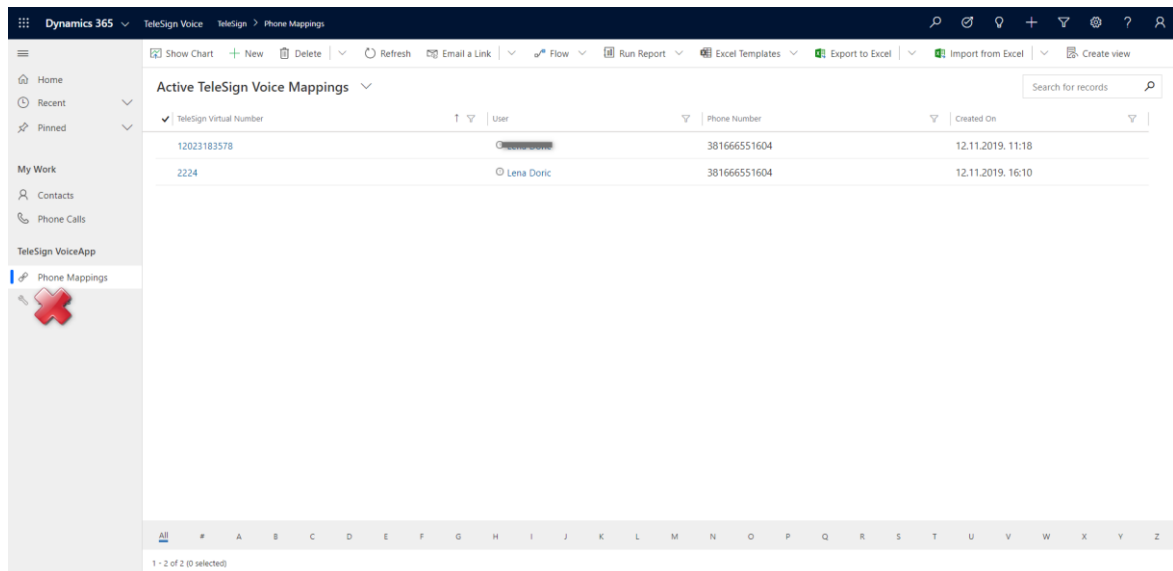- o TeleSign Voice User - can see only *Mapping* and *Phone Call* shown in picture below.

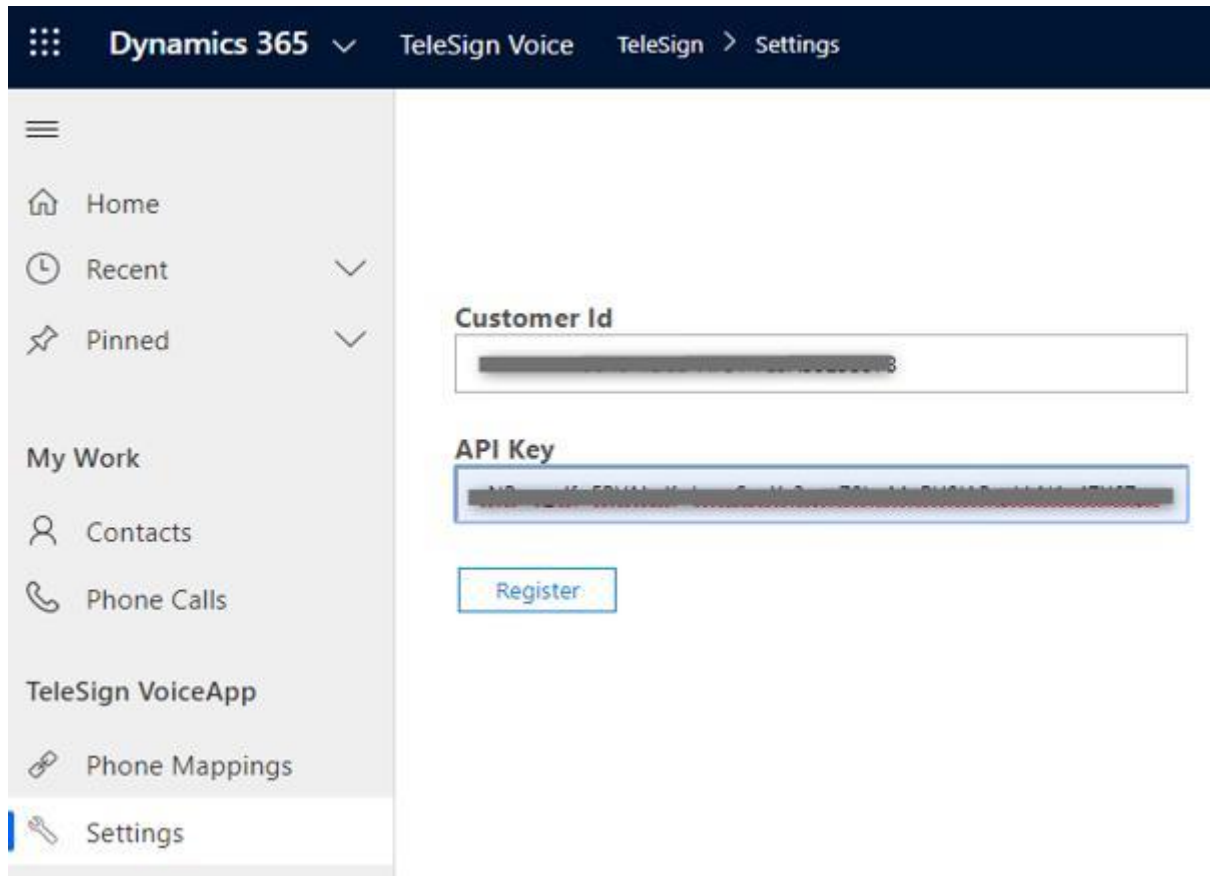Figure 7 - TeleSign Voice User privileges

After assigning roles for the application, open the TeleSign Voice application. Sign in as Telesign Voice Administrator user. First screen you will see is the TeleSign Customer ID and API Key that you need to enter for settings entity.

⚠ IMPORTANT: Please note that the TeleSign Voice application currently requires an Enterprise level TeleSign account and cannot be used with a self-service account.

TeleSign end-user must provide these parameters for the connector to run properly:

- o Telesign Customer ID
- o TeleSign API key

These parameters will be used to register each Dynamics 365 organization with TeleSign cloud infrastructure.

Figure 8 - Registration Settings (Customer ID, API Key)

After entering the ID and API Key press Register button below. New window will be opened asking user to login to Dynamics 365 environment again.
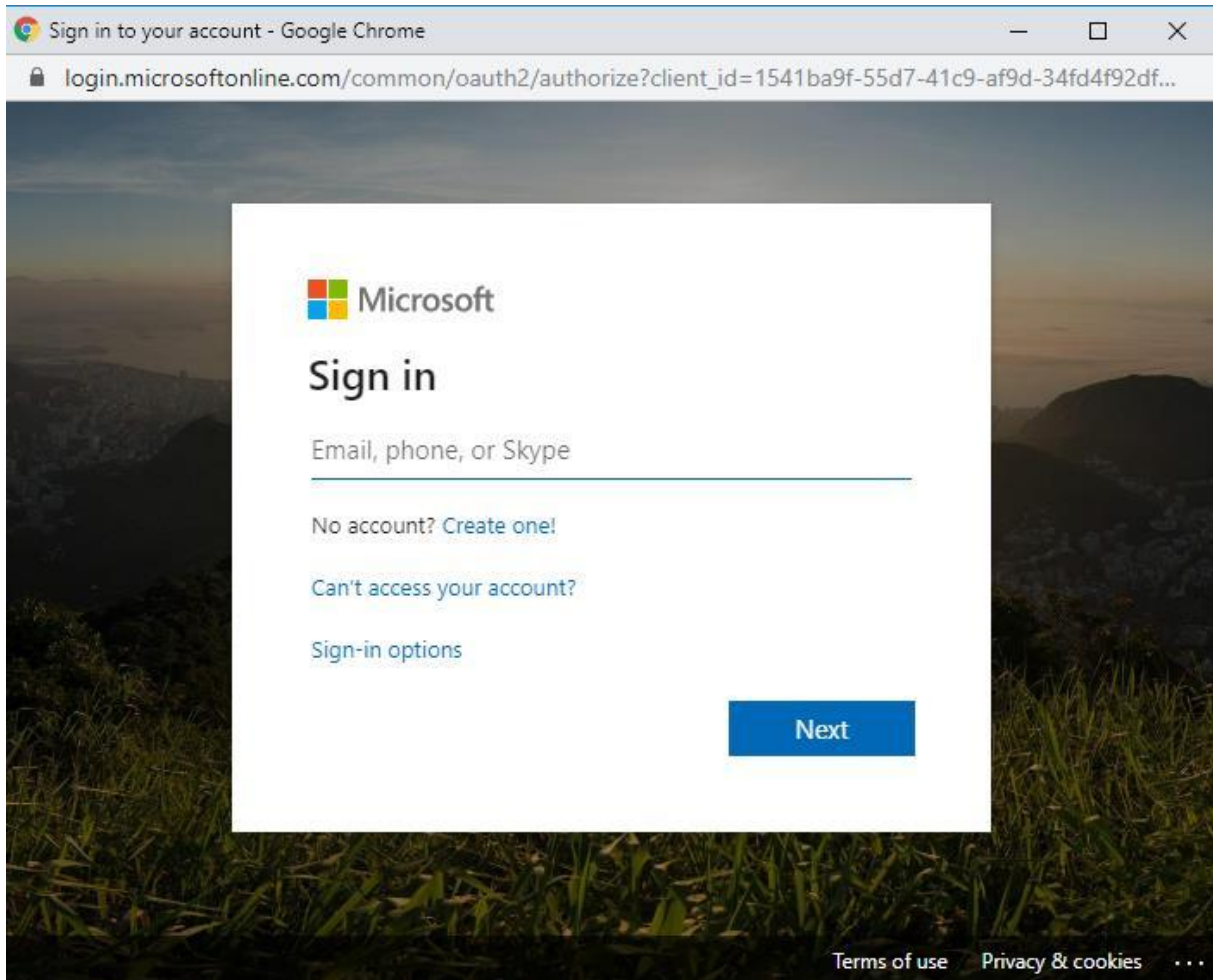
Figure 9 - Popup Sign in window

After signing into your Dynamics 365 new popup window will emerge on your screen asking user for permission. User should provide consent and click Accept.

After giving the consent another popup window will appear which will show website and all general information about TeleSign. Close the window and wait for loading to be finished.
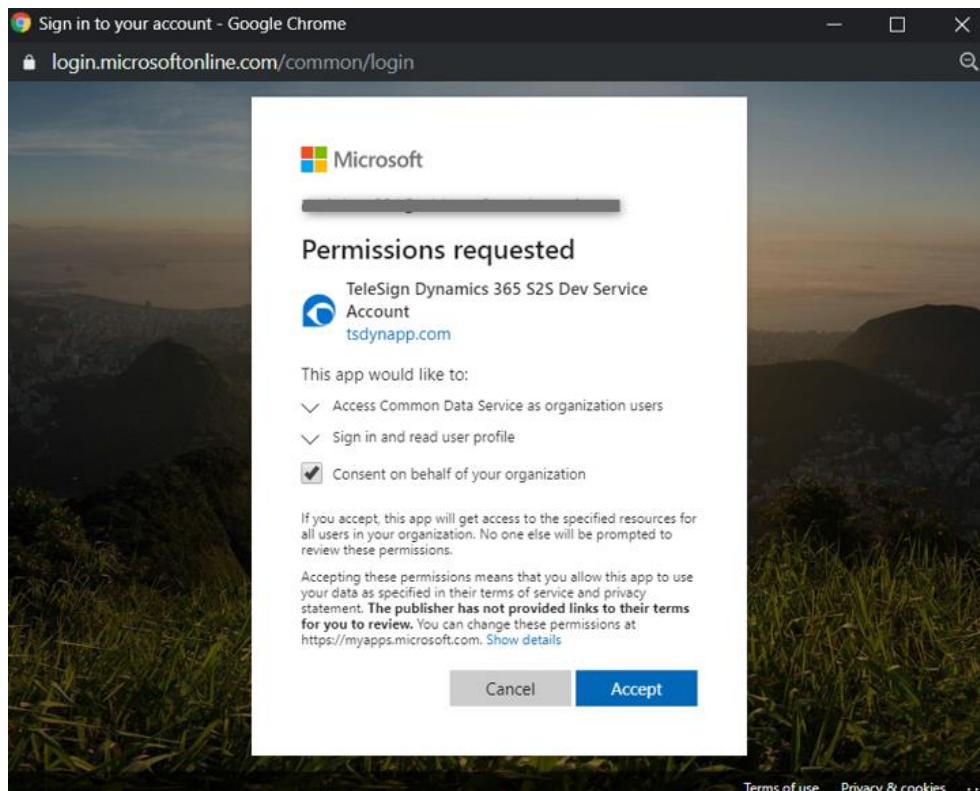
Figure 10 - Giving consent permissions

After signing into Dynamics 365 you will see a page with three links as shown in picture below. If you click on *Registration Settings* you will need to sign in again with your Customer ID and API Key.
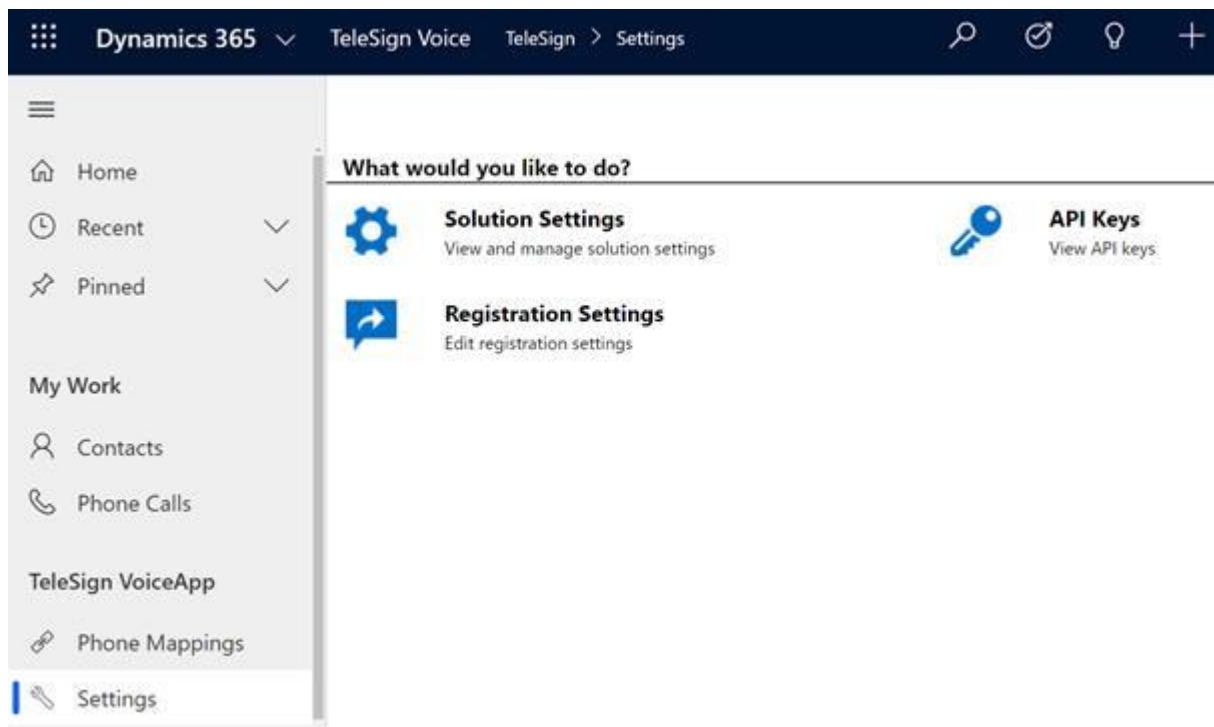

Figure 11 – Sign in and Loading screen

⚠ <u>IMPORTANT:</u> When you install the solution, new user will be created in D365 - TeleSign S2S Application User will automatically have assigned role *TeleSign Voice Administrator*.

Figure 12 - TeleSign S2S Application User with assigned roles is automatically created

3.Using TeleSign Voice Application

⚠ <u>IMPORTANT</u> Click on settings entity and you will see three links on page (Figure 11 – Sign in and Loading screen). Click on solution settings to see which of the fields is used for application.

When you enter the record, you will find attribute *User Phone Number Field Name*. The purpose of this attribute is to show which attribute is used in application to match the user that will receive the actual call. The application logic will try to match user in D365 based on this attribute.

Figure 13 - Solution Settings entity

Navigate to user entity and there will be a list of contact attributes that application needs to check to find possible matching. If you want to match and detect user based on different attribute, you should change tha value of previously mentioned attribute with different attribute (schema name) in the Solution Settings (Figure 13 - Solution Settings entity).

Example 1, if you want to match aganist Main phone attribute you should enter schema name for this attribute (address1_telephone1) into already mentioned active settings record. Enter the schema name as value in the attribute *Contact Mobile Number Field Schema Name*. This will ensure that the application will match the user based on that specific attribute.
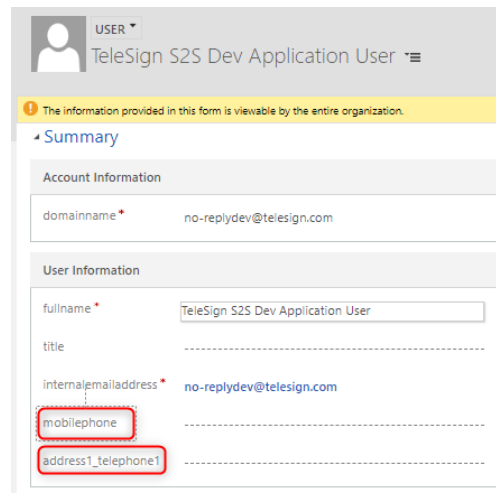

Figure 14 - Example of contact attributes that application logic uses to detect and match user in D365 with the number

Picture above shows that user entity record has many contact fields that can be used to match D365 user. This is configurable and you can change it based on business needs.
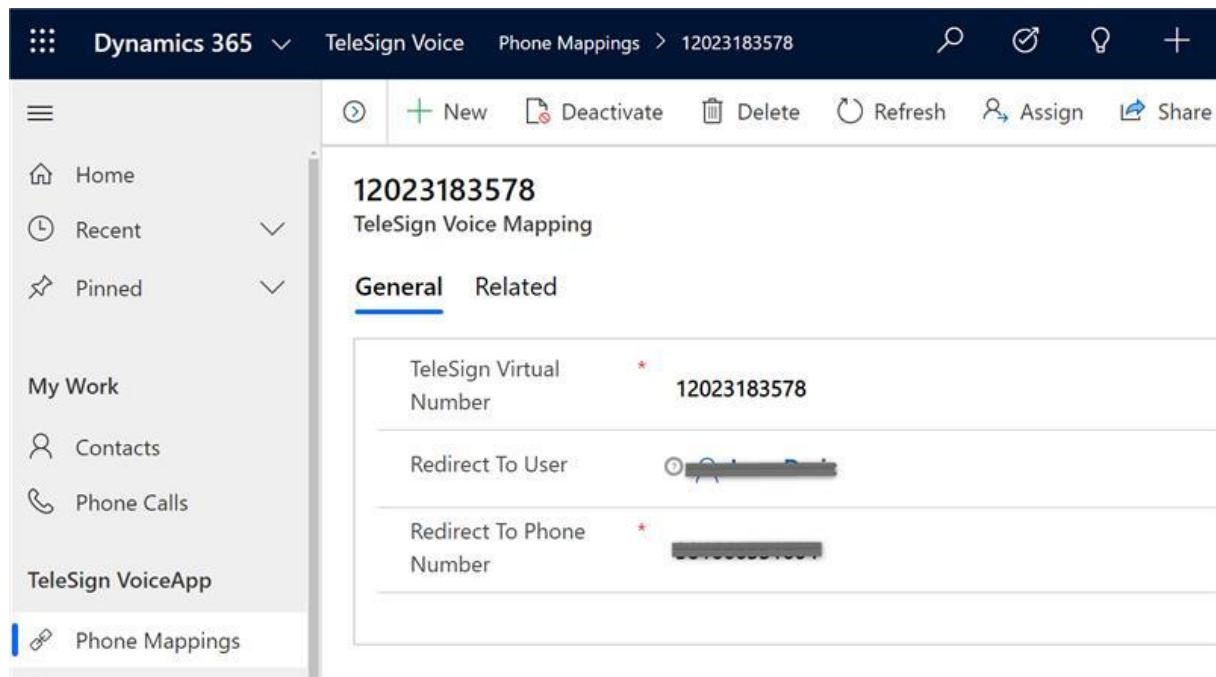

Figure 15 - TeleSign mapping record

To configure a mapping between virtual number (the number to be dialed by the end user) and the real number (the number of one of your Dynamics users)' go to Mappings entity and create a new record with virtual phone number and real number of the user.

⚠️ <u>IMPORTANT:</u> The virtual number used must be one that is acquired from TeleSign and must be a voice enabled number.'

Next step is to dial the virtual number you previously had entered in your phone. After you dial this number D365 will notify TeleSign if the specific user and number exist in D365. Also, Phone call record will be created automatically.

⚠️ <u>IMPORTANT:</u> Number you enter needs to have prefix for country.

Another option is that when a user doesn't exist in CRM and you can enter any international number. CRM will also notify TeleSign that the number exists and it will redirect the call. As previously mentioned, phone call activity will be created. If CRM does not have the number stored than it will notify TeleSign and TeleSign will end the call.

Figure 16 - Phone Call Activity

Every phone completed as previously described will be logged as an incoming phone call activity within D365 solution containing following information:

- o Created On (header) – Date and time of the phone call
- o Subject – Automatically generated ("TeleSign phone call": + "calling phone number")

- o Call From – customer (automatically populated based on ANI if such exists and is registered in D365. If not, new contact is automatically created.)
- o Call To – D365 user receiving a call
- o Phone Number – Inbound (caller) phone number
- o Call Direction – Incoming (in case of inbound phone call)
- o TeleSign Virtual Number – Virtual phone number assigned to D365 user
- o Duration (Minutes) – Phone call duration in minites