

Microsoft Dynamics CRM Widget

Installation Guide





Table of Contents

	Insta	Ilation Guide 1
1		Introduction
	1.1	Searching for entities
	1.2	Creating activities
	1.3	Logging
	1.4	Click to call
2		Prerequisites
3		Azure AD Authentication
	3.1	Configuring "Microsoft Dynamics" App 6
	3.	1.1 Setup for "Microsoft Dynamics" App in Azure
4		CRM widget integration setup in the Admin Portal11
	4.1	Azure AD Application ID & Tenant11
	4.2	Creating the Voice & Chat tabs12
5		Create Dynamics App



1 Introduction

This article describes how to install and configure the CRM widget for Microsoft Dynamics CRM. This article is meant for administrators, not the contact center agent who will use it. The Puzzel CRM Widget for Microsoft Dynamics CRM's key features are as follows:

1.1 Searching for entities

- Automatic search for contacts and accounts on an incoming request
 - The caller's phone number is the default search criteria for the voice channel
 - Email address is the default search criteria for other channels
 - o Manual search done by the agent are supported in the UI
- If there is one or more matches it can be presented in different ways
 - \circ $\,$ On a single match the match can be embedded directly in the widget
 - \circ $\,$ On multiple matches, you can select which entity to display $\,$
 - If there are no matches, we can present an option to create an entity
 - An entity can always be "popped" externally if there is a need to see the entity outside of the widget

1.2 Creating activities

- On a single match we can create an activity automatically
- On multiple matches the agent must select which entity gets the activity
- On no match the agent can create the activity after creating a new account or contact

1.3 Logging

The CRM Widget will log different data such as:

- Queue
- Agent
- Caller's number
- Dialled number
- Queue time
- Call answered
- Session ID

With access to Puzzel's RAW data, all data are available.



1.4 Click to call

The CRM widget contain its own click-to-call button.



2 Prerequisites

Some prerequisites must be in place for the CRM widget to function properly:

- Microsoft Dynamics Online (version 9)
 - Unified interface in Dynamics Online must be used.
- Microsoft Azure AD



3 Azure AD Authentication

Some features in Puzzel's contact centre Agent Application requires users (agents) to authenticate themselves in Azure AD. The authentication is among others used to enable the CRM Widget towards "Microsoft Dynamics CRM Online" but can also be used for Azure authentication towards custom/external widgets.

This document shows a step by step how-to for configuring Azure AD to get the required App ID URI required by the Agent Application in order to authenticate the user (agent).

3.1 Configuring "Microsoft Dynamics" App

Follow the below steps for enabling Azure authentication used by Puzzel. After setting up the app in Azure, you must enable Microsoft Dynamics in the Admin Portal described in a separate chapter.

Note: The screenshots and descriptions below are based on the Azure AD service release "1904" tenant, and the user is a "Global Administrator" with sufficient access.

3.1.1 Setup for "Microsoft Dynamics" App in Azure

1. Go to <u>https://portal.azure.com</u> and login with the Global Admin for your domain. In the leftmost pane, choose "Azure Active Directory".

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2. Choose "App Registrations".



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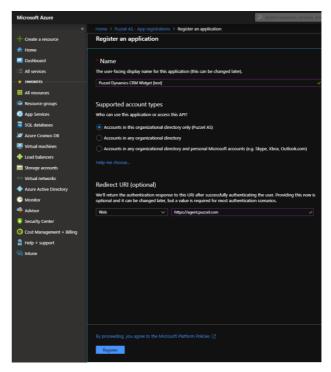
3. Click on the "New registration" option.

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💠 Load balancers	Devices	CatalystOne HR		19.9.2018	-
Storage accounts	App registrations				
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Help + support	Mobility (MDM and MAM)	SharePoint Online Client Extensibility Web Applie	cation Principal	5.11.2018	

4. Fill in the following 3 sections:

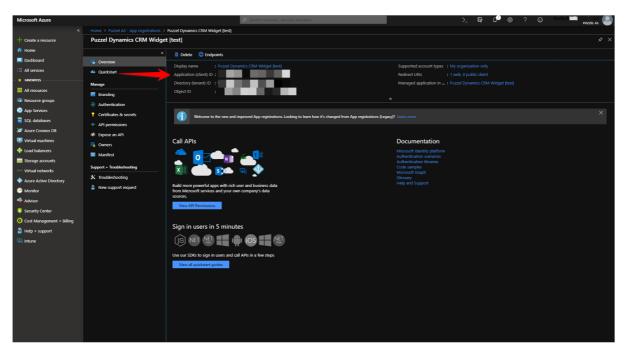
- Name Choose a name for the application (e.g. "Puzzel Dynamics CRM Widget)
- Supported account types Choose which ever option that is relevant for you. The recommended option is "Accounts in this organizational directory only (<directory name>)
- Redirect URI (optional) Choose "Web" and <u>https://agent.puzzel.com</u>

Click on the "Register" button. ->





5. Here you can see the given Application (client) ID you need for the Admin Portal later.



Under "Authentication" make sure <u>https://agent.puzzel.com/*</u> is set as "Redirect

Note: Due to changes in Azure interface in May 2019, you need to set the redirect URL with wildcard * in the old Azure interface.

URI" "Access tokens" & "ID Tokens" under "Implicit Grant" must be ticked on.



Dynamics CRM

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«		Puzzel Dynamics CRM Widget [test] - Authentication	
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A Home	«	Sive X Discard 5 Try out the new experience Got feedback?	
	🕰 Quickstart	Redirect URIs	
All resources	Manage	The URIs that we will accept as distinutions when returning authentication responses (tokens) after successfully authenticating users. Also referred to as reply URLs. Learn more about adding support for web, mobile and disktop clients [2]	
📦 Resource groups	Branding	TYPE REDIRECT URI	
Services	Certificates & secrets	Web https://agent.puzzel.com	Ó
SQL databases	 API permissions 	Web e.g. https://myopp.com/buth	
	 Epoce an API Denners Manifest Sepport i "headedwooding X Toublechooding New support request 	Suggested Bedirect URIs for public clients (mobile, desktop) If you an using the Microsoft Automation Lizery (ASA) or the Artic Directory Automation Lizery (ADA) to bail application for desktop or mobile desktop, som payles from the suggested Bedirect URIs below or enter a cardom redirect URI above. For more information, Here to the Elizery documentation. The Article Control of the Art	
		To enable the implicit grant flow, select the tokens you would like to be issued by the authorization endpoint: ✓ Access tokens ✓ ID tokens Default client type ●	
		Trest application as a public client. Required for the use of the following flows where a redirect URI is not used:	

6. Choose "API permissions, click on the «Add a permission» add the following permissions:

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Click on the «Grant admin consent for <directory name>" under "Grant consent".



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Dashboard	👢 Overview	Do you want to grant consent for the request	ed permissions for all acc	counts in Puzzel AS? This will update any existing admin	n consent records this application alre	ady has to match wha	at is listed below.
E All services	📣 Quickstart	Yes No					
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Virtual machines	Owners						
Load balancers	Manifest		Delegated	Read user and shared calendars			
Storage accounts	Support + Troubleshooting						
 Virtual networks 	X Troubleshooting		Delegated	Sign in and read user profile			
Azure Active Directory Monitor	New support request	These are the permissions that this application re	puests statically. You may a	iko request user consent-			
Monitor Advisor		able permissions dynamically through code. See					
Security Center		Grant consent					
O Cost Management + Billing		As an administrator, you can grant consent on be					
Help + support		means that end users will not be shown a conser	t screen when using the ap	plication.			
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You should see a "Successfully granted admin consent for requested permissions" confirmation at the top of the screen.

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4 CRM widget integration setup in the Admin Portal

In the Admin Portal, you need to add your Azure app details in order for the Microsoft Dynamics CRM widget functionality work properly.

First, you must activate the Microsoft Dynamics widget for your solution, if you haven't already done so. This is done under "Widget -> Widget Administration" in the Admin Portal. Find the "Microsoft Dynamics" widget and tick the rightmost belonging to check box.

Remember to save your settings.

Microsoft Dynamics

The "Microsoft Dynamics" widget should now be available under "Widget -> Widget Configuration -> Microsoft Dynamics. Here you must add the following property details:

DynamicsAppID – Add the DynamicsAppID for Dynamics Online environment.

10000

- OrganizationURI Add the OrganizationURL for Dynamics Online environment
- url This is the URL for the widget, this property are default set to: https://dynamics-widget.puzzel.com/msd/

Remember to save your settings

uick find users/user groups	Company	
	Inherit	Value
DynamicsAppID		xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
OrganizationURI		xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
rl		https://dynamics-widget.puzzel.com/msd/

4.1 Azure AD Application ID & Tenant

The "Microsoft Dynamics" widget should now be available under "Users -> Products -> Agent Application. Here you must add the following property details:

- Azure AD Application Id Enter the Azure AD Application Id
- Azure AD Tenant Enter the Azure AD Tenant



Azure AD Application Id	******
Azure AD Tenant	*****

4.2 Creating the Voice & Chat tabs

You need to customize the Voice (Phone) & chat tab's, so that they contain the CRM widget. Refer to the Widget documentation if you are uncertain on how to setup custom tabs.



Note: Remember to disable the default phone and chat tab, e.g. Phone (voice) tab, remember to set the Event to: SYSTEM_INCOMING_CALL



Use the new Unified Interface only (recommended)

Enable only the Unified Interface

5 Create Dynamics App

With Microsoft Online CRM, the function Unified Interface must be enabled. Documentation on how to enable this can be found here: <u>https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/enable-unified-interface-only</u>

Setting to No will allow use of the legacy web client and make it the default. Learn more ← → C ■ http 8910 21bei 0 🖸 🙆 Dynamics 365 v Customer Service Service > Ad SANDBOX ٢ Q Q 💑 Open Org Chart 🛛 🗋 🖙 Email a Link 📋 De 82 P Add to Marketing List ය Hom Number of Employees RI Raggen INC Annual Revenue AppID in the URL Recent \$958.245.842.00 • 🔉 Raymond Vartdal 🖈 Pinned Summary Details Related My Work ACCOUNT INFORMATION # Dashbo Timeline Activities Account Name Raggen INC 0 Enter a r Customers OLDER ↓ 0 Account Fax Primary Contact Auto-post on wall: Raggen INC - Friday, No vember 16, 2018 8:13 AM A Contacts R Raymond Vartda ount: Created By Raymond Vartdal Website . . . Social Profile 🛆 Email © Like S Reply Parent Account Service 17 Menu on te left side Cases Ticker Symbol A Burine P Queues Collateral CONTACTS ADDRESS Products Address 1: Street 1 Ð Tools Address 1: Street 2 No data availabl Reports Address 1: Street 3 RECENT OPPORTUNITIES P Address 1: City Oslo

Note: When Unified Interface is enabled, your Dynamics interface will change. The menu will be on the left side and you will see an AppID in the Dynamics URL.

Yes No