

An abstract graphic at the top of the page consists of several overlapping organic shapes in a vibrant pink color against a white background. The shapes are fluid and rounded, creating a modern, artistic header.

Microsoft Dynamics CRM Widget

Installation Guide



Solving
Customer
Interactions

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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
 - 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
 - On a single match the match can be embedded directly in the widget
 - 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
- ▶ Dialed 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).

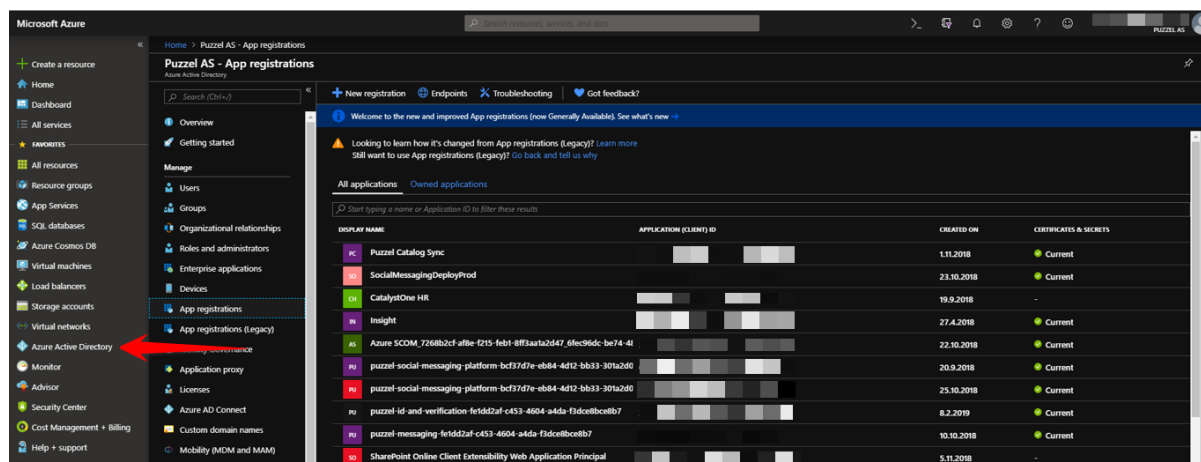
3.1 Configuring “Microsoft Dynamics” App

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.

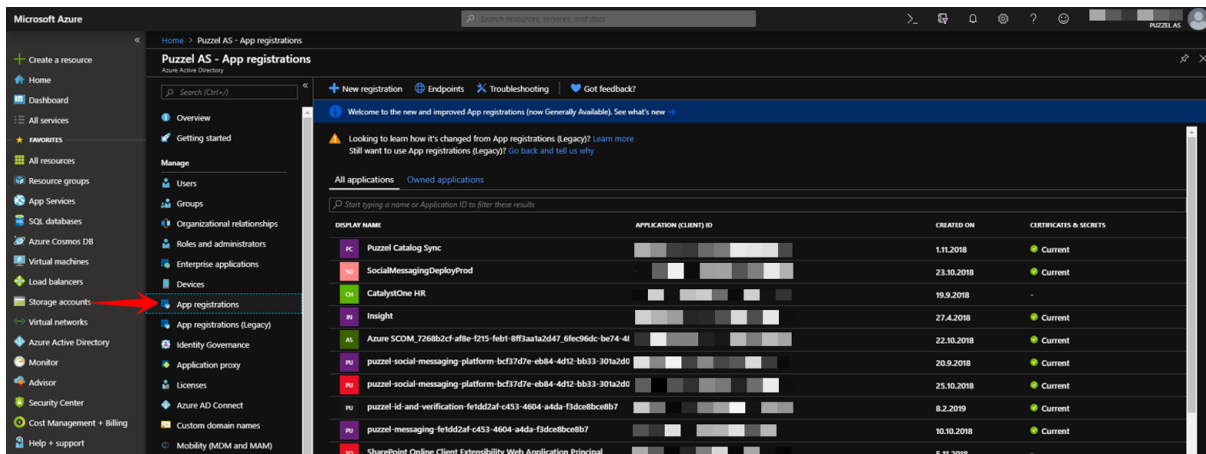
Note: The screenshots and descriptions below are based on the Azure AD service release “1904” tenant, and the user is a “Global Administrator” with sufficient access.

3.1.1 Setup for “Microsoft Dynamics” App in Azure

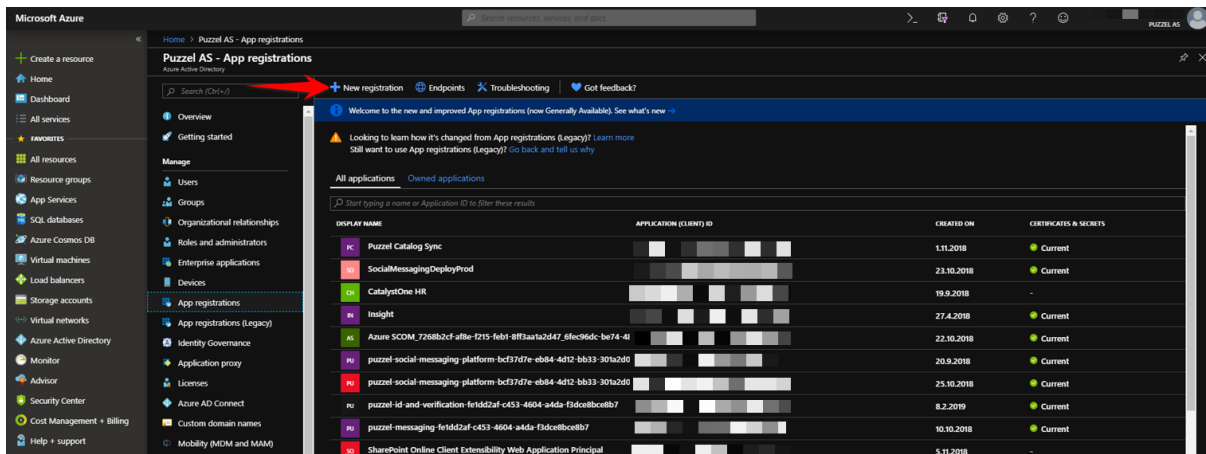
1. Go to <https://portal.azure.com> and login with the Global Admin for your domain. In the leftmost pane, choose “Azure Active Directory”.



2. Choose “App Registrations”.



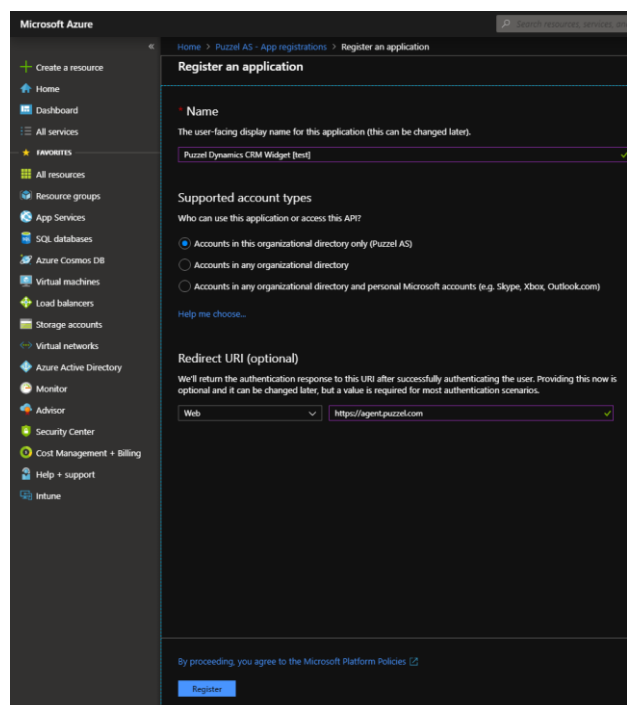
3. Click on the “New registration” option.



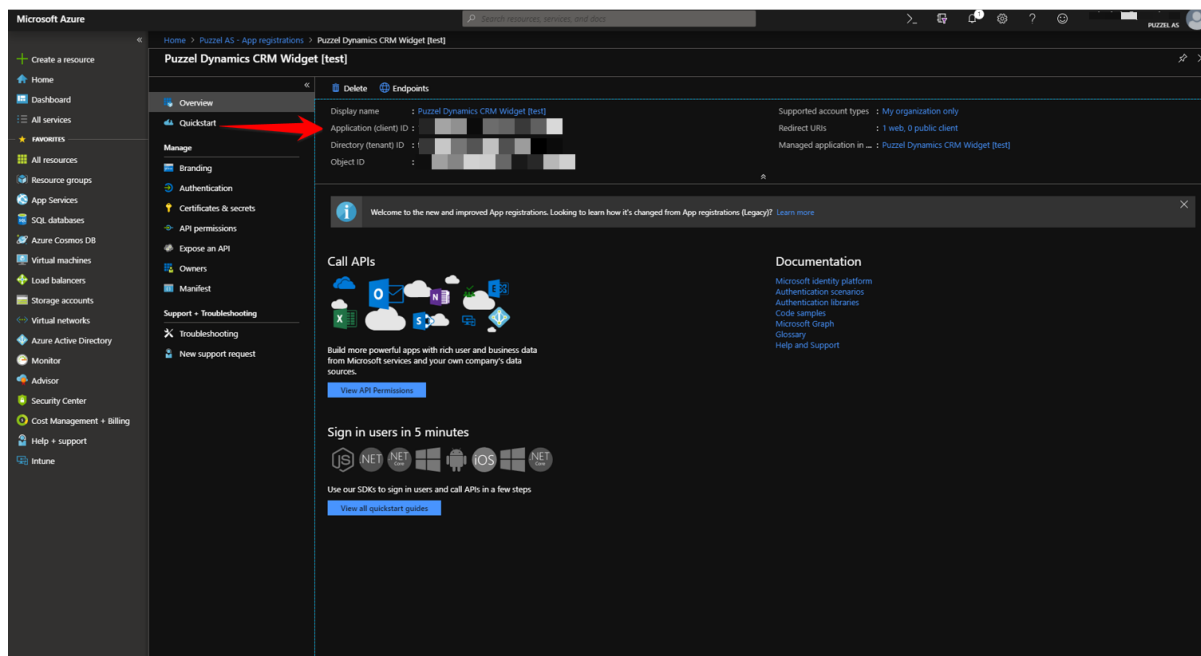
4. Fill in the following 3 sections:

- ▶ **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 <https://agent.puzzel.com>

Click on the “Register” button. ->



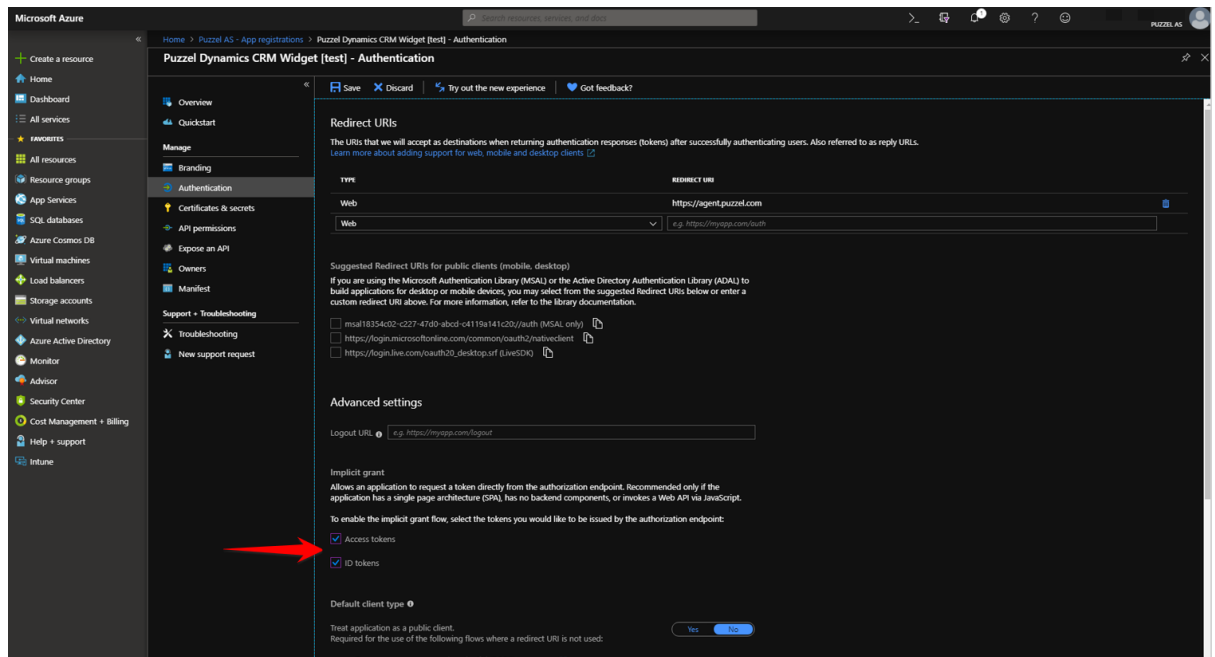
- Here you can see the given Application (client) ID you need for the Admin Portal later.



Under “Authentication” make sure https://agent.puzzel.com/* 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.

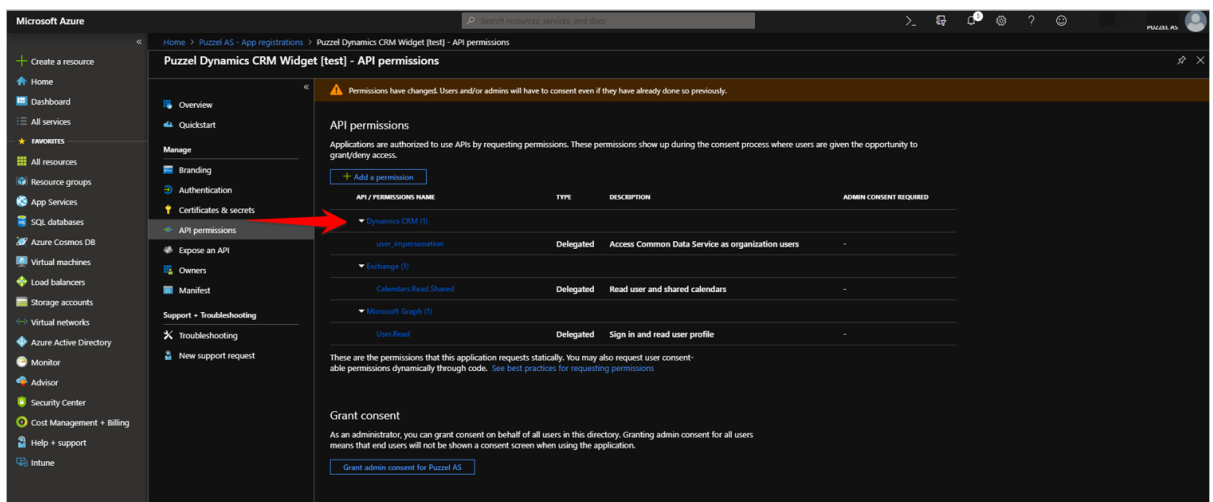
URI” “Access tokens” & “ID Tokens” under “Implicit Grant” must be ticked on.



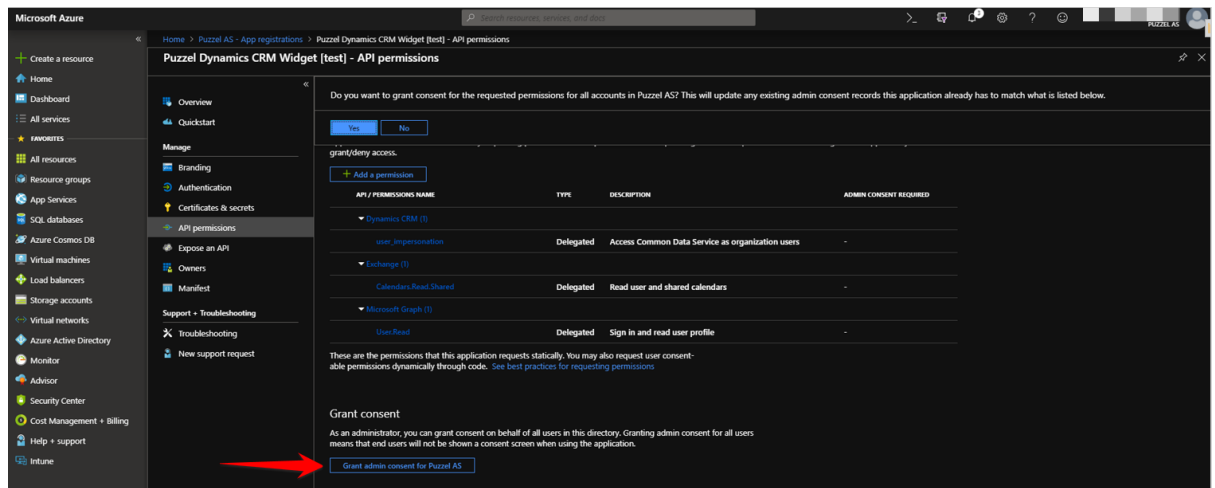
- Choose “API permissions, click on the «Add a permission» add the following permissions:

Dynamics CRM

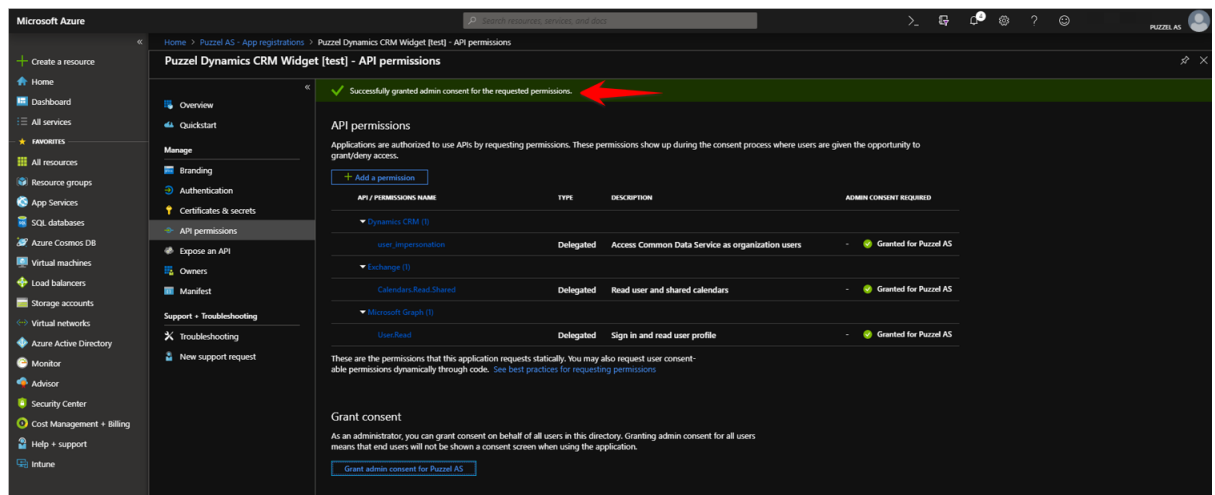
User_impersonate



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



You should see a “Successfully granted admin consent for requested permissions” confirmation at the top of the screen.



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	10000	<input checked="" type="checkbox"/>
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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.
- ▶ **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

Microsoft Dynamics	
Quick find users/user groups	
	Company
	Inherit Value
DynamicsAppID	<input type="checkbox"/> <input type="text" value="xx"/>
OrganizationURI	<input type="checkbox"/> <input type="text" value="xx"/>
url	<input type="checkbox"/> <input type="text" value="https://dynamics-widget.puzzel.com/msd/"/>
<input type="button" value="Save changes"/> <input type="button" value="Undo changes"/>	

4.1 Azure AD Application ID & Tenant

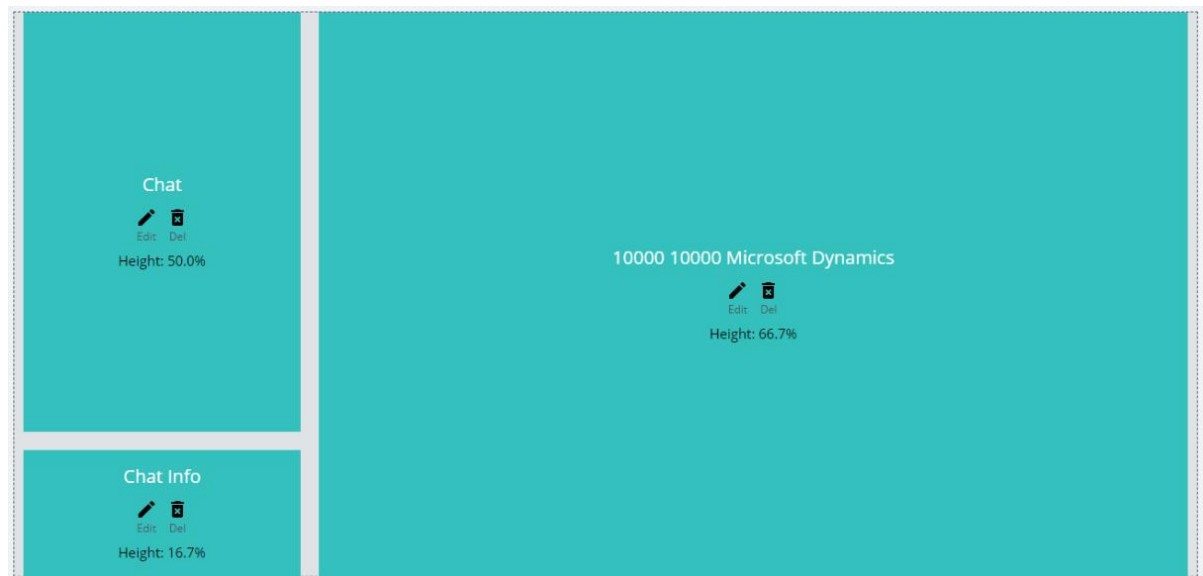
The "Microsoft Dynamics" widget should now be available under "Users -> Products -> Agent Application. Here you must add the following property details:

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

Azure AD Application Id	<input type="checkbox"/>	XXXXXXXXXXXXXXXXXXXXXXXXXXXX
Azure AD Tenant	<input type="checkbox"/>	XXXXXXXXXXXXXXXXXXXXXXXXXXXX

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

5 Create Dynamics App

With Microsoft Online CRM, the function Unified Interface must be enabled.

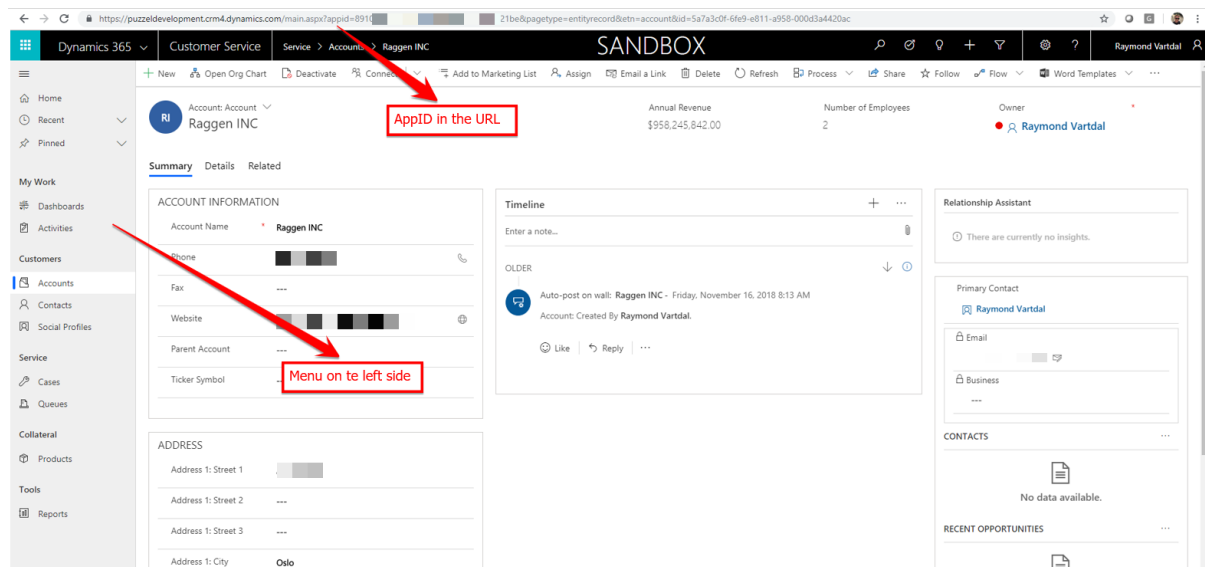
Documentation on how to enable this can be found here: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/enable-unified-interface-only>

Use the new Unified Interface only (recommended)

Enable only the Unified Interface

☒ Yes ☐ No

Setting to No will allow use of the legacy web client and make it the default. [Learn more](#)



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.