tenfold

Microsoft Dynamics Integration Overview

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Introduction

Audience

This document is directed to customers and prospective customers interested in using Tenfold in a Microsoft Dynamics environment. Those who will perform the procedures described in this guide should have a basic level of familiarity with Microsoft Dynamics APIs, Microsoft Dynamics administration, general networking, and Tenfold.

Goals

The goal of this document is to provide knowledge, reference, and procedural information necessary to understand a proposed Microsoft Dynamics/Tenfold integration.

This document is NOT intended as a specific system or network design document. If further clarification is needed, consult with a Tenfold representative.

Terminology

To ensure a common frame of reference, this guide uses the following terms in conjunction with this Microsoft Dynamics integration:

- **Application Programing Interface (API):** A set of clearly defined methods of communication used by Tenfold for reading and writing data.
- **Click to Dial**: A feature in the Tenfold UI which allows agents to click a phone number to dial a contact.
- **Tenfold Cloud:** A set of Web Services that receives events from the telephony system and takes further action such as querying and saving to the CRM.
- **Tenfold User Interface (TUI)**: An agent facing user interface which agents will interact with for identifying callers, viewing recent activities, saving notes, dispositioning calls, etc.

Customer Responsibilities

You are responsible for supplying the physical and/or IP connection(s) to Microsoft Dynamics and LAN, and for obtaining and loading any licensing required by Microsoft Dynamics. You are also responsible for configuring Microsoft Dynamics to support the Tenfold integration.

Integration Overview

Microsoft Dynamics Requirements

Version Requirements

Microsoft Dynamics 365 8.2.1.0176 or later

Connection Requirements

Accessible via TCP port 443 (https) to Tenfold Cloud

Dedicated Service Account (i.e. API User)

Field Permissions

The below tables outline the out of the box entities and respective field permissions required for the core Tenfold integration. Read and/or write permissions for additional fields, both standard and custom, may be required for your Tenfold deployment.

User

Entity - User	Field	Required Permissions
User	systemuserid	Read
User	fullname	Read
User	internalemailaddress	Read
User	domainname	Read

Account

Entity - Account	Field	Required Permissions
Account	accountid	Read

Account	name	Read / Write
Account	ownerid	Read / Write
Account	emailaddress1	Read / Write
Account	telephone1	Read / Write
Account	telephone2	Read / Write
Account	telephone3	Read / Write
Account	description	Read
Account	parentaccountid	Read / Write
Account	parententityid	Read / Write
Account	createdon	Read
Account	statuscode	Read / Write
Account	statecode	Read / Write

Contact

Entity - Contact	Field	Required Permissions
Contact	contactid	Read
Contact	parentcustomerid	Read / Write
Contact	fullname	Read / Write
Contact	firstname	Read / Write
Contact	lastname	Read / Write
Contact	ownerid	Read / Write
Contact	emailaddress1	Read / Write
Contact	mobilephone	Read / Write
Contact	telephone1	Read / Write

Contact	telephone2	Read / Write
Contact	telephone3	Read / Write
Contact	description	Read
Contact	statuscode	Read / Write
Contact	statecode	Read / Write
Contact	createdon	Read

Lead

Entity - Lead	Field	Required Permissions
Lead	leadid	Read
Lead	firstname	Read / Write
Lead	lastname	Read / Write
Lead	ownerid	Read / Write
Lead	emailaddress1	Read / Write
Lead	mobilephone	Read / Write
Lead	telephone1	Read / Write
Lead	telephone2	Read / Write
Lead	telephone3	Read / Write
Lead	companyname	Read / Write
Lead	statuscode	Read / Write
Lead	statecode	Read / Write
Lead	createdon	Read
Lead	parentaccountid	Read / Write
Lead	description	Read

Phone Call

Entity - Phone Call	Field	Required Permissions
Phone Call	activityid	Read
Phone Call	subject	Read / Write
Phone Call	description	Read / Write
Phone Call	phonenumber	Read / Write
Phone Call	scheduledstart	Read / Write
Phone Call	scheduledend	Read / Write
Phone Call	directioncode	Read / Write
Phone Call	actualdurationminutes	Read / Write
Phone Call	regardingobjectid	Read / Write
Phone Call	ownerid	Read / Write
Phone Call	statecode	Read / Write
Phone Call	statuscode	Read / Write
Phone Call	to	Read / Write
Phone Call	from	Read / Write

Activity Pointer

Entity – Activity Pointer	Field	Required Permissions
Activity Pointer	activityid	Read / Write
Activity Pointer	statecode	Read / Write
Activity Pointer	statuscode	Read / Write

Activity Party

Entity – Activity Party	Field	Required Permissions

Activity Party	activityid	Read
Activity Party	partyid	Read / Write
Activity Party	ownerid	Read / Write

Task

Entity - Task	Field	Required Permissions
Task	activityid	Read
Task	subject	Read / Write
Task	description	Read / Write
Task	activitytypecode	Read / Write
Task	ownerid	Read / Write
Task	regardingobjectid	Read / Write
Task	scheduledstart	Read / Write
Task	scheduledend	Read / Write
Task	regardingobjectid	Read / Write
Task	createdon	Read

Opportunity

Entity - Opportunity	Field	Required Permissions
Opportunity	opportunityid	Read
Opportunity	name	Read
Opportunity	ownerid	Read
Opportunity	actualclosedate	Read
Opportunity	stepname	Read
Opportunity	parentaccountid	Read

Opportunity	parentcontactid	Read
Opportunity	estimatedvalue	Read
Opportunity	closeprobability	Read
Opportunity	actualvalue	Read
Opportunity	createdon	Read
Opportunity	statecode	Read
Opportunity	statuscode	Read

Case

Entity - Case	Field	Required Permissions
Case	incidentid	Read
Case	name	Read
Case	primarycontactid	Read
Case	ownerid	Read
Case	customerid	Read
Case	ticketnumber	Read
Case	title	Read
Case	description	Read
Case	severitycode	Read
Case	isescalated	Read
Case	createdon	Read
Case	prioritycode	Read
Case	statecode	Read
Case	statuscode	Read

Installation

Installation Requirements

Dynamics Hostname	Hostname of your Microsoft Dynamics Instance
Dynamics Service Account Username	The username for the dedicated Tenfold service account (i.e. API User)
Dynamics Service Account Password	The password for the dedicated Tenfold service account (i.e. API User)

Overview

Establishing the initial connection from Tenfold to Microsoft Dynamics takes only few minutes.

1. Start by navigating to your Tenfold dashboard at https://dashboard.tenfold.com
2. Select the **Company Settings** link in the top navigation
3. In the sub-navigation, select **CRM**
4. Select Microsoft Dynamics as your CRM.
5. You will be able to selected authentication methods between Oauth or Credentials
   - For credentials, input your connecting information into the form
     i. Hostname
     ii. Service Account Username
     iii. Service Account Password
   - Click **Save**.
   - For Oauth, follow the prompt on the screen and ensure that you're already authenticated within Dynamics with the desired service account

Upon clicking save, if the information provided is correct, Tenfold will test the connection and present a success message.

Microsoft Dynamics

| Microsoft Dynamics | ⇕ |

Connected to Dynamics

☁ Change production user

Authentication type

| OAuth | ⇕ |

Hostname

| https://tenfoldsandbox.crm.dynamics.com |

| Change Advanced Options |