

TeleSign Voice for D365 User Manual

Version 1.1.0.0



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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

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

Maintain a global presence with a localized experience

- Receive Voice calls globally, in more than 100 countries and territories and 25+ languages
- 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

- Utilize a virtual phone number that can route to anyone within your organization
- 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

- Use Virtual Numbers as publicly facing contact numbers
- Run Inbound Voice Campaigns to drive engagement towards your organization
- 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.

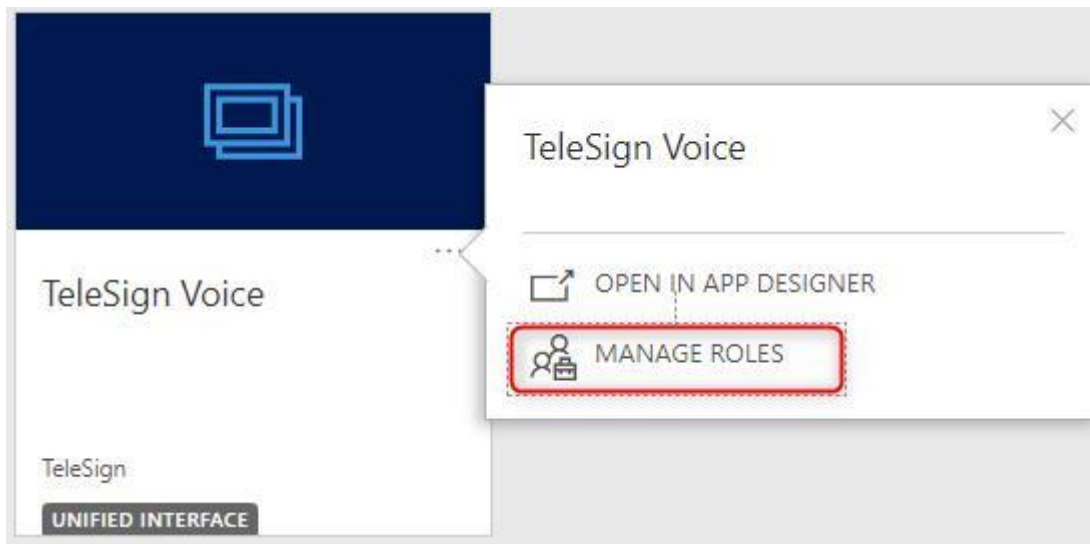
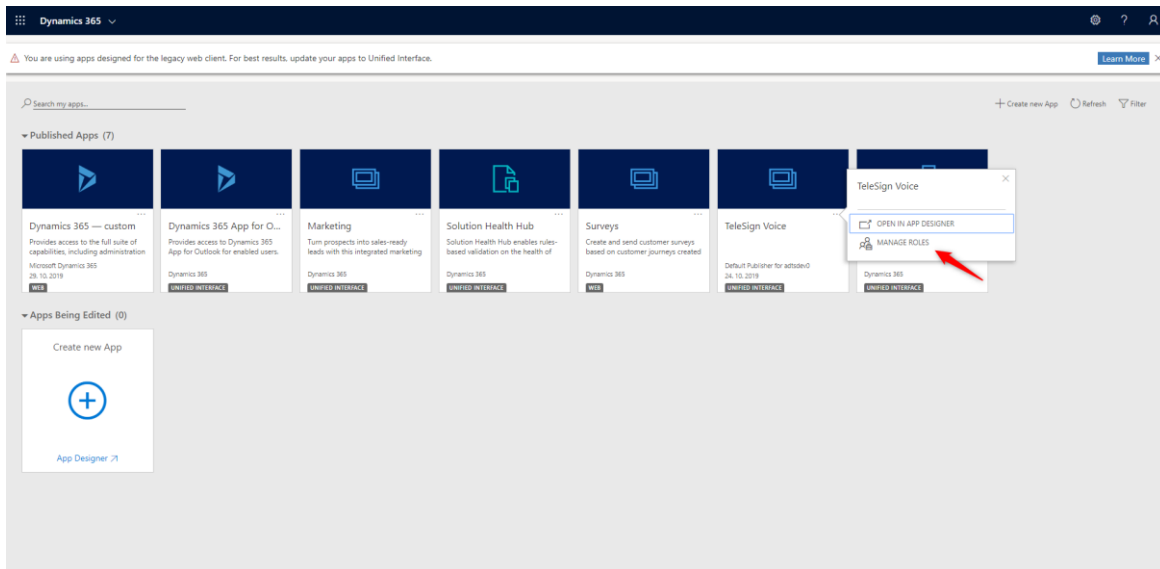


Figure 1 - TeleSign Voice Application

TeleSign Voice has predefined roles included:

- TeleSign Voice Administrator and
- TeleSign Voice User.

Manage Roles - TeleSign Voice

Choose an app URL that is easy to remember and then select which roles can access it.

> App URL Suffix

✓ Roles

✓	Name	Business Unit
✓	Schedule Manager	addatrieltest
✓	Scheduler	addatrieltest
✓	Solution Checker	addatrieltest
✓	Support User	addatrieltest
✓	Survey Owner	addatrieltest
✓	Survey Services Administrator	addatrieltest
✓	System Administrator	addatrieltest
✓	System Customizer	addatrieltest
✓	TeleSign SMS: Administrator	addatrieltest
✓	TeleSign SMS: Advanced User	addatrieltest
✓	TeleSign SMS: User	addatrieltest
✓	TeleSign Voice Administrator	addatrieltest
✓	TeleSign Voice User	addatrieltest
✓	Vice President of Marketing	addatrieltest
✓	Vice President of Sales	addatrieltest
2 of 52 selected		

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.

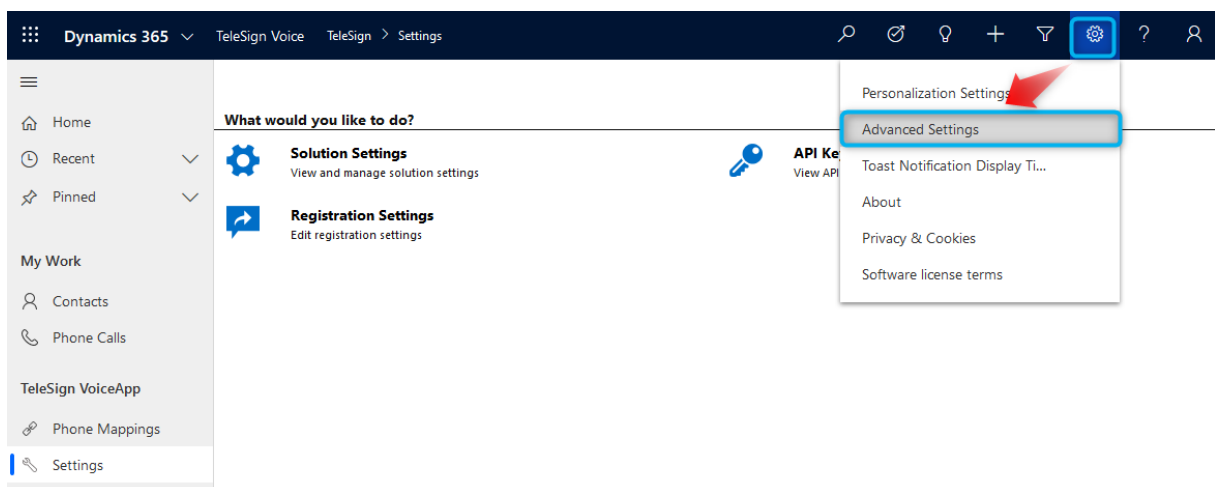


Figure 3 - Navigation to advanced settings

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

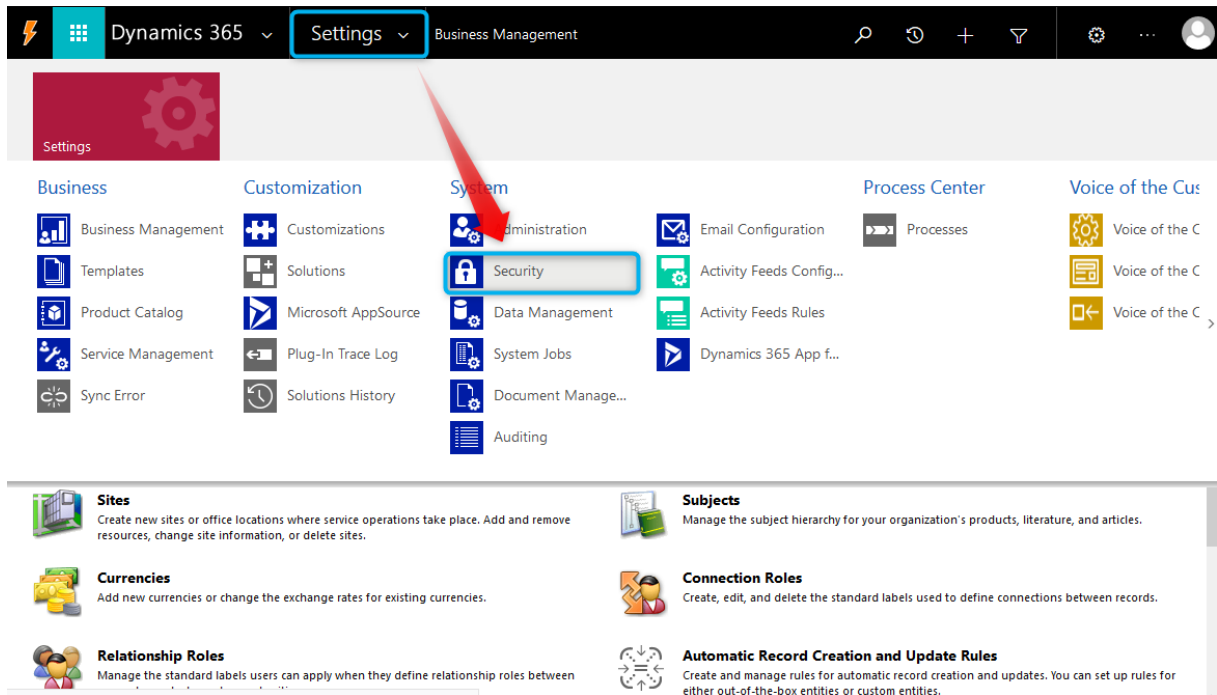


Figure 4 - Navigation to security settings

- Choose Users.

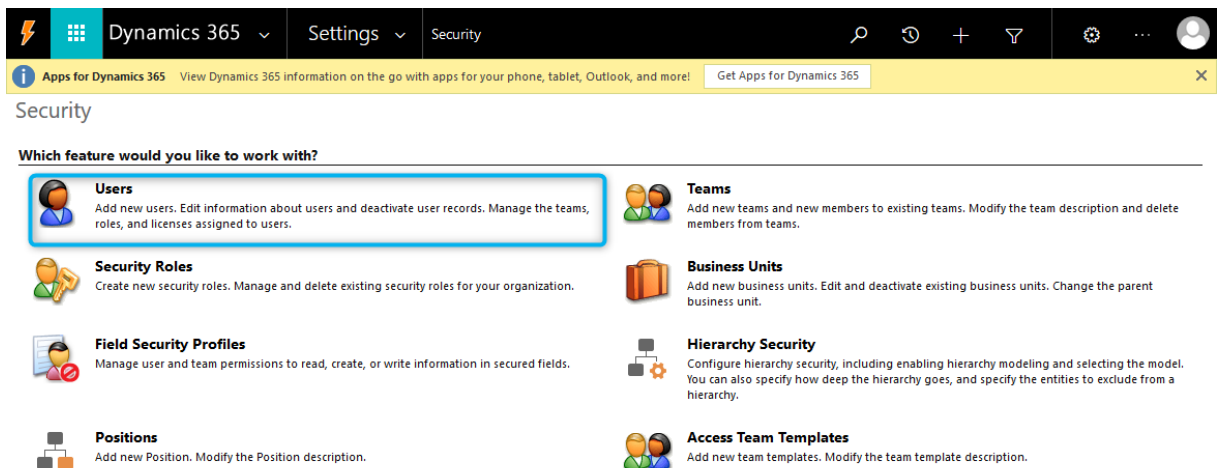


Figure 5 - Navigation to user administration

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

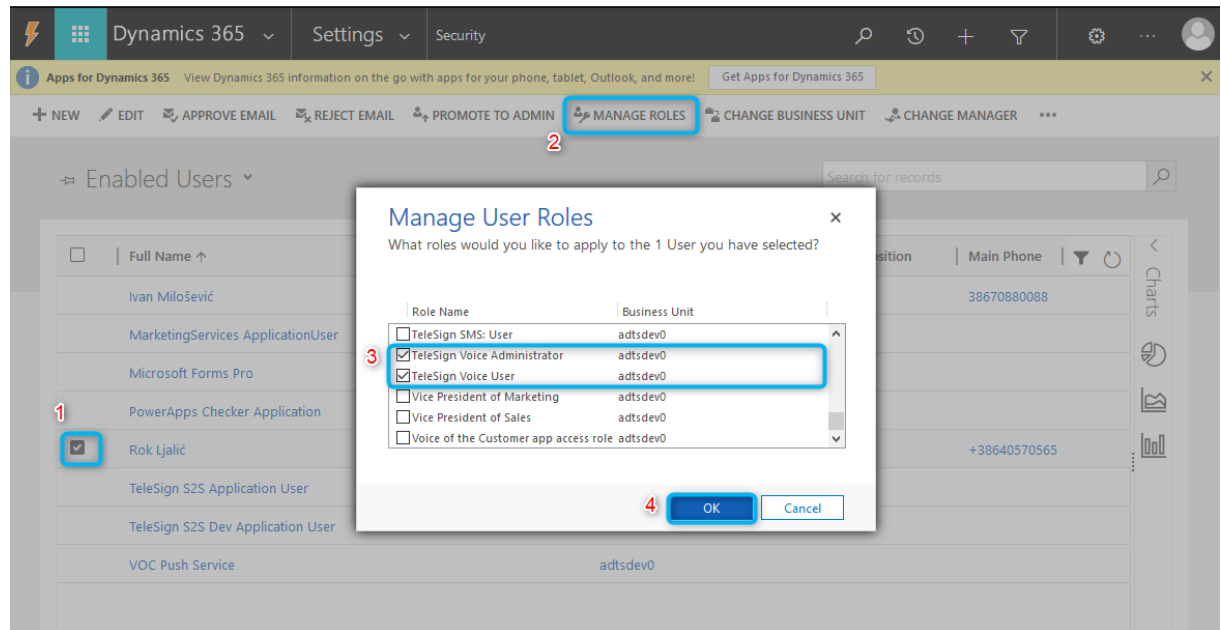


Figure 6 - D365 user role assignment

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

- TeleSign Voice Administrator - can see and configure all entities
- TeleSign Voice User - can see only *Mapping* and *Phone Call* shown in picture below.

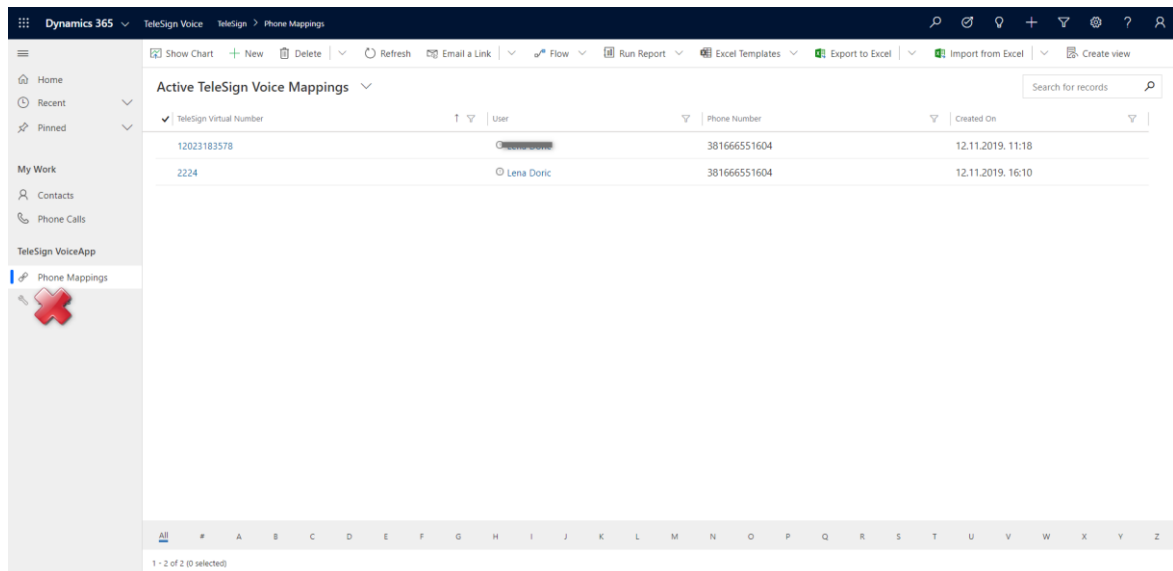


Figure 7 - TeleSign Voice User privileges

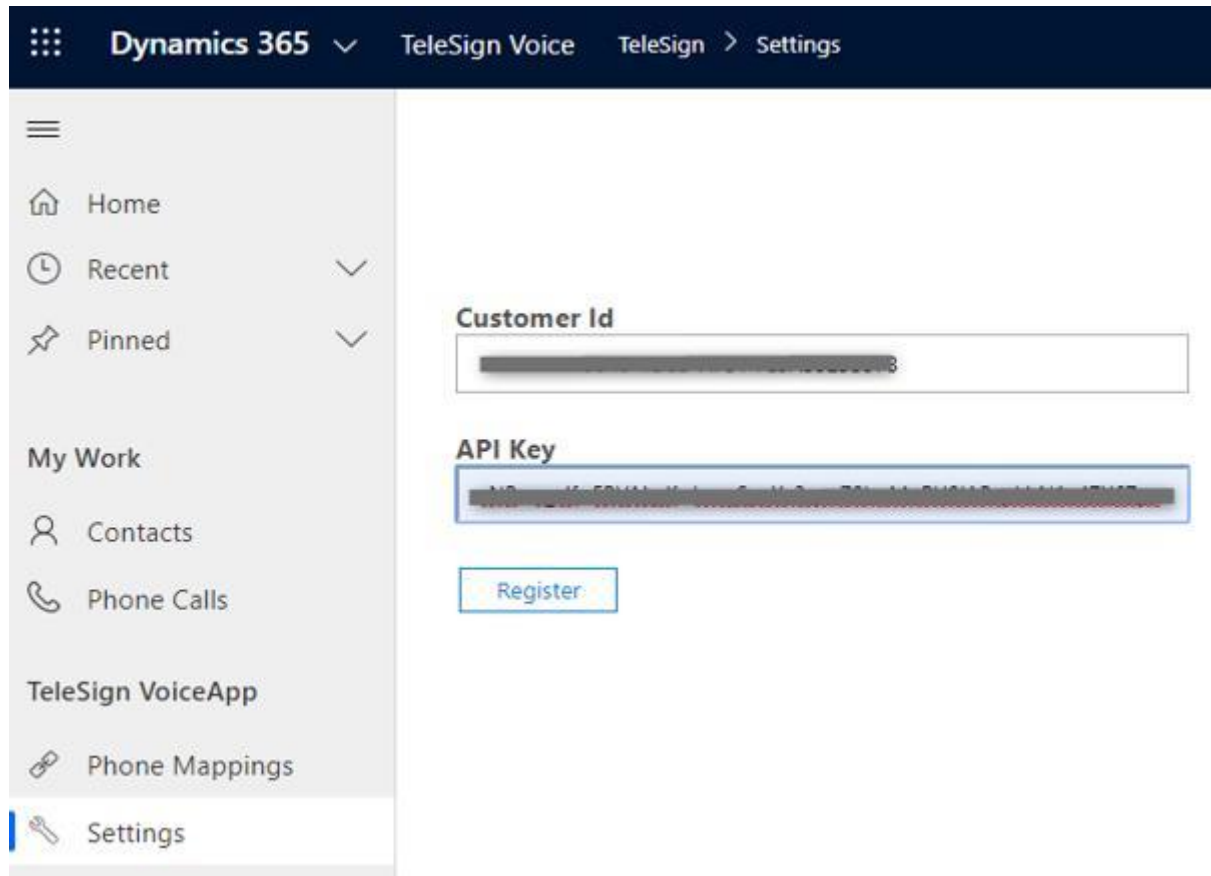
After assigning roles for the application, open the TeleSign Voice application. Sign in as TeleSign Voice Administrator user. First screen you will see is the TeleSign Customer ID and API Key that you need to enter for settings entity.

⚠ 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:

- TeleSign Customer ID
- TeleSign API key

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



The screenshot shows the Dynamics 365 interface with the TeleSign Voice settings page. The left sidebar contains navigation options: Home, Recent, Pinned, My Work, Contacts, Phone Calls, TeleSign VoiceApp, Phone Mappings, and Settings (highlighted). The main content area has a dark blue header with 'Dynamics 365', 'TeleSign Voice', and 'TeleSign > Settings'. Below the header, there are two input fields: 'Customer Id' and 'API Key'. The 'API Key' field is highlighted with a blue border. Below these fields is a 'Register' button.

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.

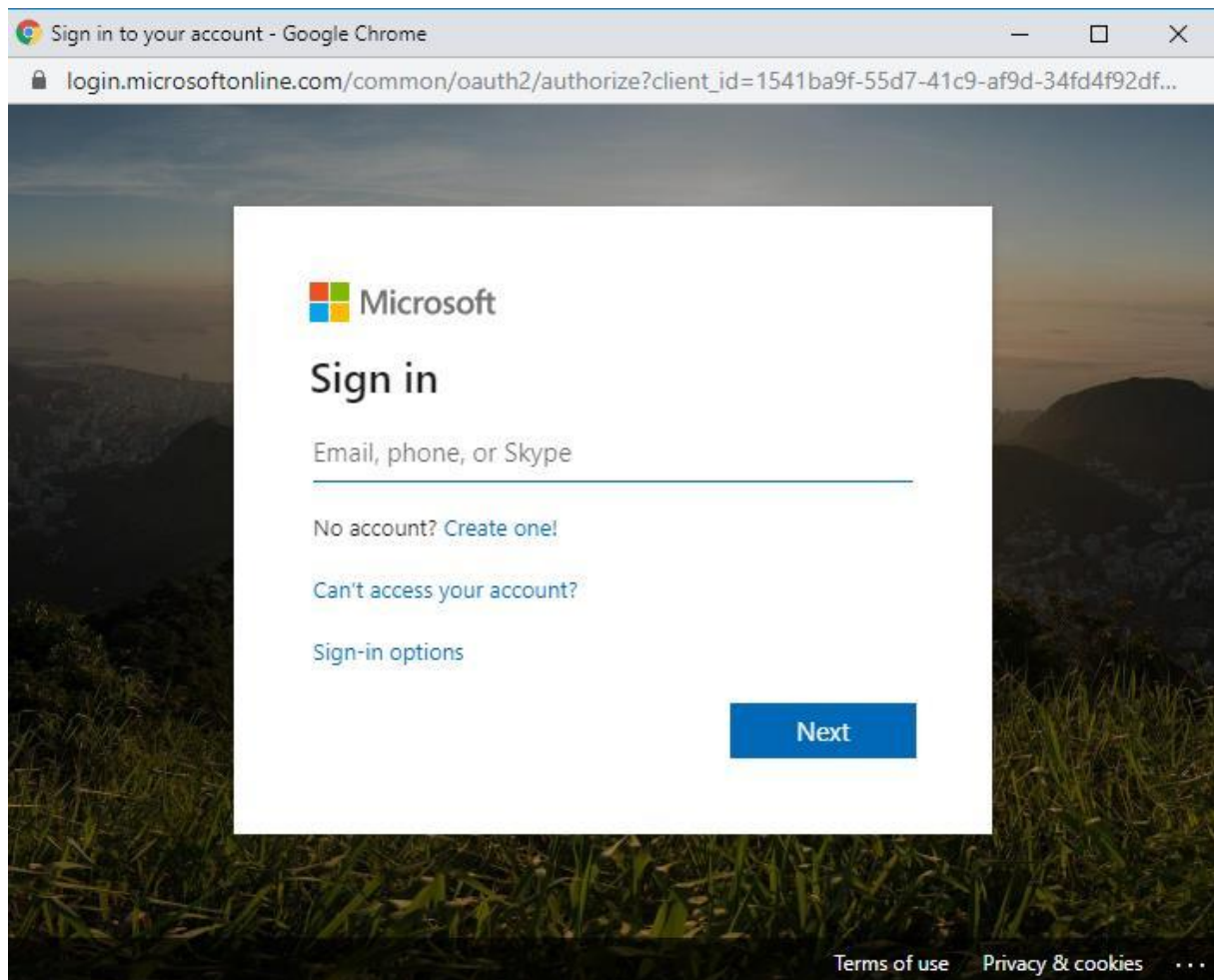


Figure 9 - Popup Sign in window

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.

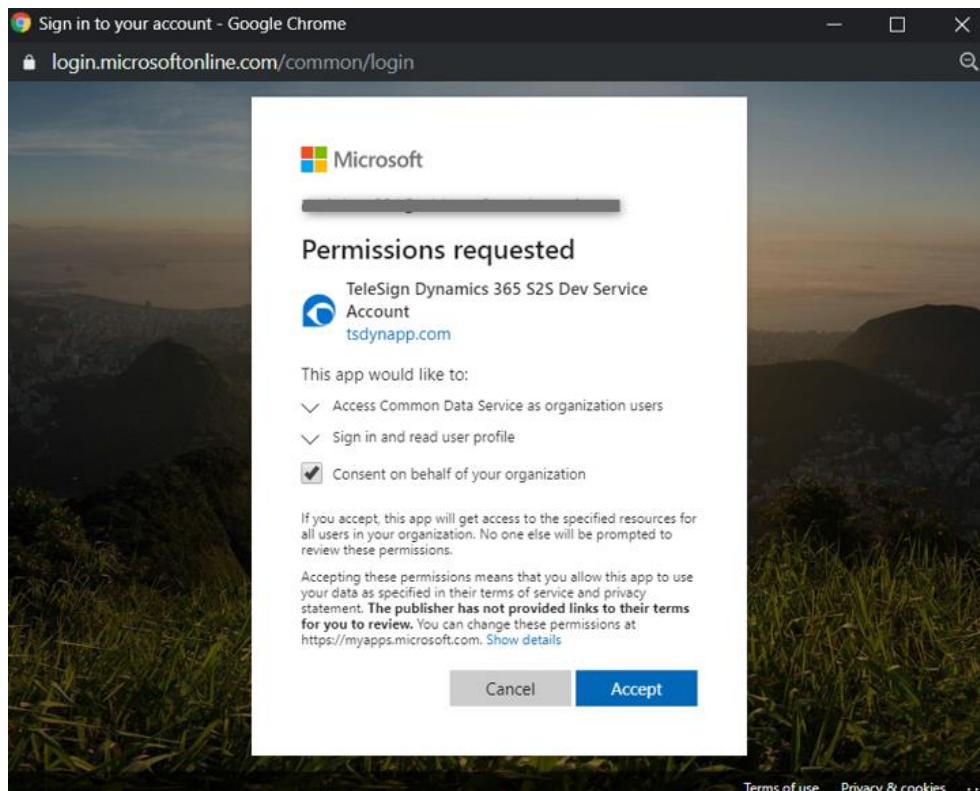


Figure 10 - Giving consent permissions

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.

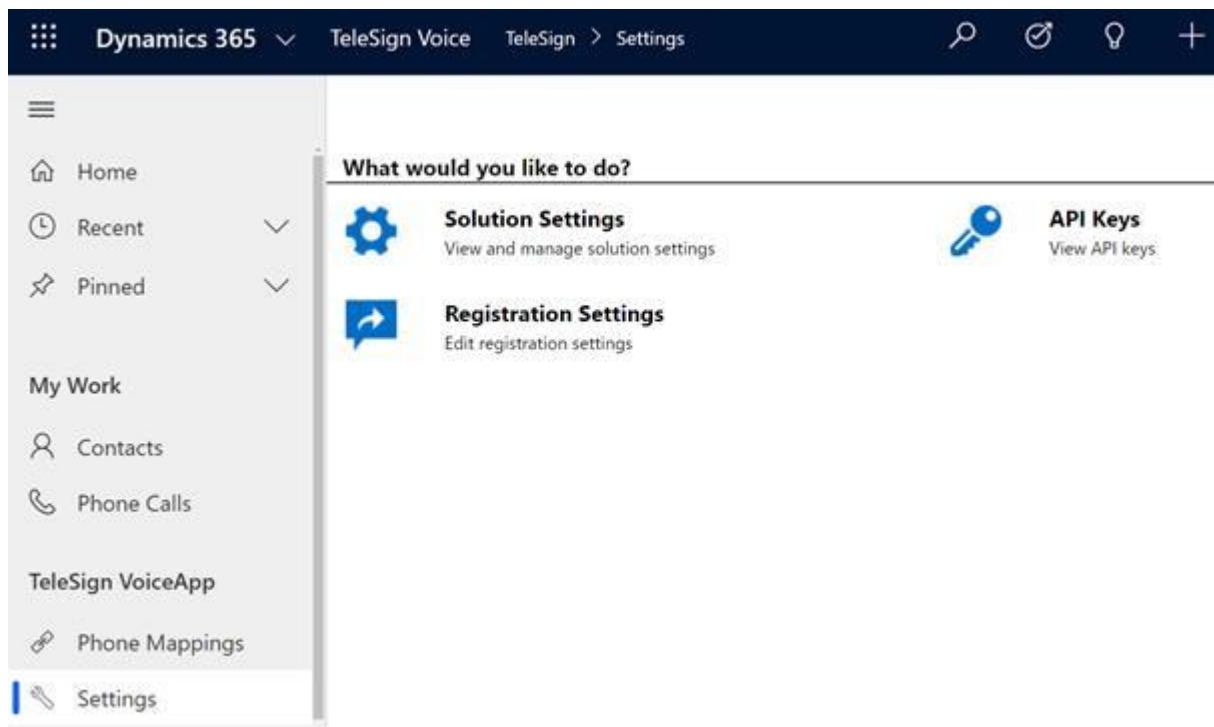


Figure 11 – Sign in and Loading screen

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

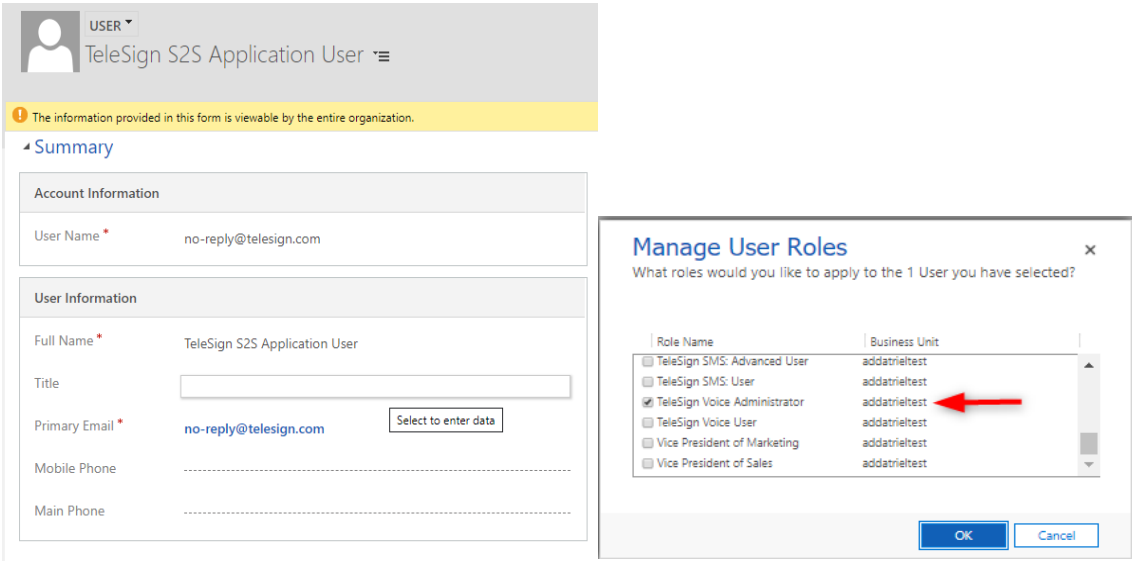


Figure 12 - TeleSign S2S Application User with assigned roles is automatically created

3.Using TeleSign Voice Application

TeleSign Voice Settings

IMPORTANT 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 are used for application.

Below image shows an example of configuration.

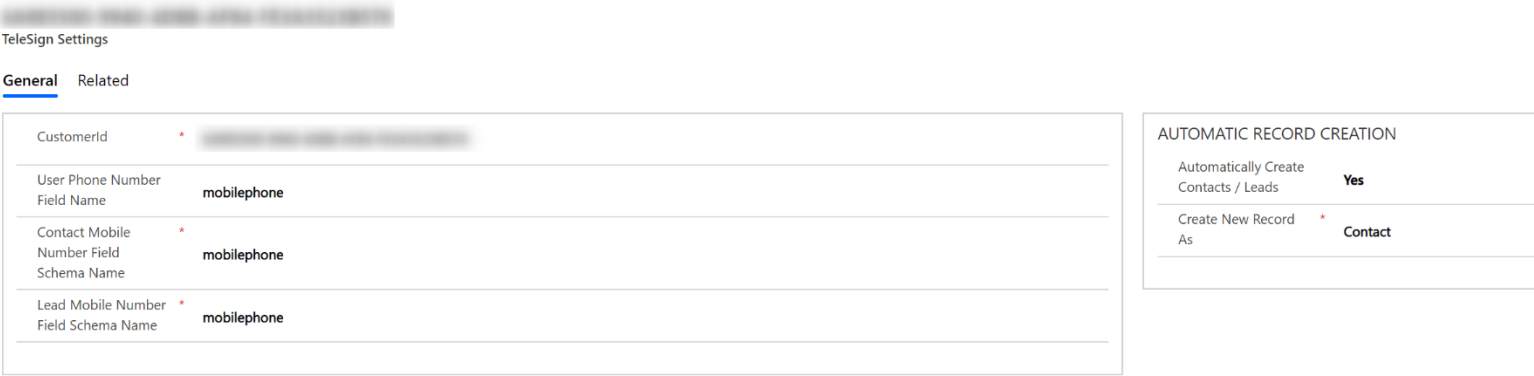


Figure 13 - TeleSign Voice Settings

Fields description

- User Phone Number Field Name:* Value of this field should contain logical name of attribute from System User entity that contains phone number. During Phone Mapping record creation (when you select user in "Redirect To User"), application logic copies value from desired field into "Redirect To Phone Number" field.

- *Contact Mobile Number Field Schema Name*: Field contains logical name of mobile phone number field on contact entity. When searching, this value is used for matching existing contacts.
- *Lead Mobile Number Field Schema Name*: Field contains logical name of mobile phone number field on lead entity. When searching, this value is used for matching existing leads.

Automatic Record Creation

In this section of settings, you are able to specify if you would like automatic record creation of contacts / leads (field "Automatically Create Contacts / Leads"). If you select Yes, you will also need to specify if you would prefer contacts or leads to be created (field "Create New Record As").

To keep created records as unique as possible, they are created in the following way:

first name = end user's phone number

last name = TeleSign Record

TeleSign Voice Mapping

The screenshot displays the TeleSign Voice Mapping interface. On the left is a navigation sidebar with options: Home, Recent, Pinned, My Work (Contacts, Phone Calls), TeleSign VoiceApp (Phone Mappings, Settings). The 'Phone Mappings' option is highlighted with a red box. The main area shows a record for virtual number 12023183578. At the top, there are action buttons: New, Deactivate, Delete, Refresh, Assign, Share, and Email a Link. Below the title '12023183578 TeleSign Voice Mapping', there are tabs for 'General' and 'Related'. The 'General' tab is active, showing a table of mapping details:

TeleSign Virtual Number	*	12023183578
Redirect To User		---
Redirect To Phone Number	*	[REDACTED]
Persist Incoming Caller ID	*	No

Figure 14 - TeleSign mapping record

To configure a mapping between virtual number (the number to be dialled by the end user) and the real number (the number of one of your Dynamics users) go to Phone Mappings entity and create a new record with virtual phone number and real number of the user. If receiving user exists in CRM as system user, you can just select this user in Redirect To User field. Phone number will be automatically retrieved from selected user (if it is specified).

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

Next step is just to dial the virtual number you had previously entered. TeleSign will receive specified phone number (Redirect To Phone Number) and then initiate the dialling to that number. Also, phone call record will be created automatically in CRM.

⚠ IMPORTANT: Number you enter needs to have prefix for country.

Another option is when user doesn't exist in CRM. For this, you can enter any international number in Redirect To phone Number field. During call procedure, a phone call activity will be created in CRM.

On TeleSign Mappings entity you also need to specify if you would like the initiating caller ID to be persistent (field "*Persist Incoming Caller ID*"). When this value is set to Yes, original number will be shown to receiving caller. If you set this field to No, virtual number is being displayed on the receiving phone.

By default, this value is set to Yes.

Phone Call activity creation

The screenshot displays the Dynamics 365 user interface for a 'Phone Call' activity. The top navigation bar shows 'Dynamics 365' and 'TeleSign Voice'. The left sidebar contains navigation options: Home, Recent, Pinned, My Work, Contacts, Phone Calls, and TeleSign VoiceApp (with sub-items Phone Mappings and Settings). The main content area shows the details of a specific phone call record.

Read-only This record's status: Completed

Refresh Process Delete Email a Link Add to Queue

TeleSign phone call: 381608052802

Phone Call · Phone Call

4. 12. 2019 16:13 Created On | Completed Status | Rok Ljalić Owner

Phone Call Related

Subject	* TeleSign phone call: 381608052802
Call From	* Abbie Gardiner
Call To	* Rok Ljalić
Phone Number	381608052802
Direction	Incoming
TeleSign Virtual Number	12023183578
Duration (Minutes)	3,50

Figure 15 - Phone Call Activity

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

- Created On (header) – Date and time of the phone call
- Subject – Automatically generated ("TeleSign phone call": + "calling phone number")
- Call From – customer (automatically populated based on ANI (Automatic number identification) if such exists and is registered in D365. If not, new contact/lead is automatically created.)
- Call To – D365 user receiving a call

- Phone Number – Inbound (caller) phone number
- Call Direction – Incoming (in case of inbound phone call)
- TeleSign Virtual Number – Virtual phone number assigned to D365 user
- Duration (Minutes) – Phone call duration in minutes