Dynamics 365 embedded telephony integration with CloudCTI

Introduction

The embedded telephony integration offers click-to-dial, caller recognition and screen pop, all from within the Dynamics 365 environment and without the need for any locally installed software.

Key features

- Click-to-dial enabled for phone numbers in Dynamics 365.
- Caller recognition on incoming calls.
- Screen pop function (automatic or manually)
- Call log entries in the caller's activity history.
- Contact management, use quick add for unmatched phone numbers.

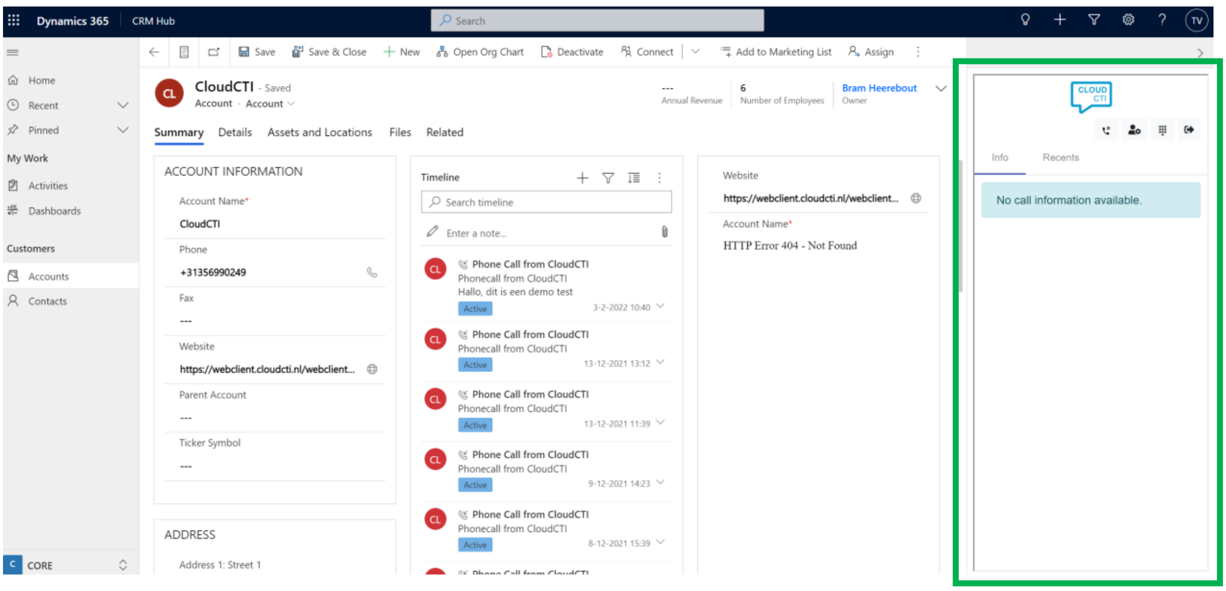
Prerequisites

To use the Dynamics 365 integration the following is required:

- An active CloudCTI user account with embedded license
- An active Microsoft Dynamics 365 account with admin privileges
- A file resource file "WebclientDynamicsHTML.html", download in a zip from here: https://download.cloudcti.nl/files/WebclientDynamicsHTML.zip

Overview

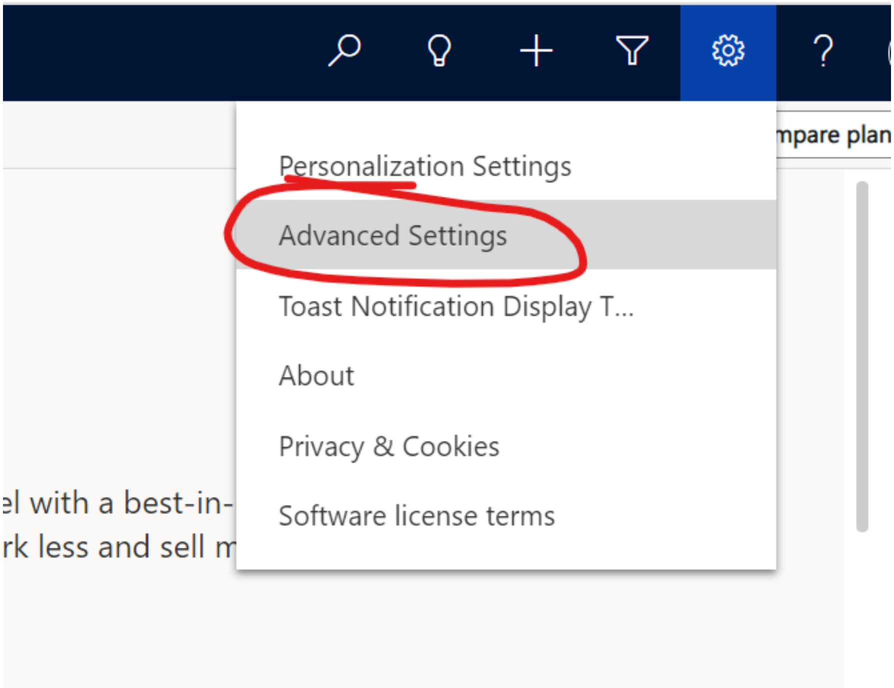
Because Microsoft Dynamics 365 is highly customizable, the integration is offered as a resource that must be added to your own Dynamics pages. Therefore, the first steps describe how to configure the new resources. Subsequently, this document explains how to add them to your own pages. Upon completion the users will have the call information as a side panel within their Dynamics 365 user interface.



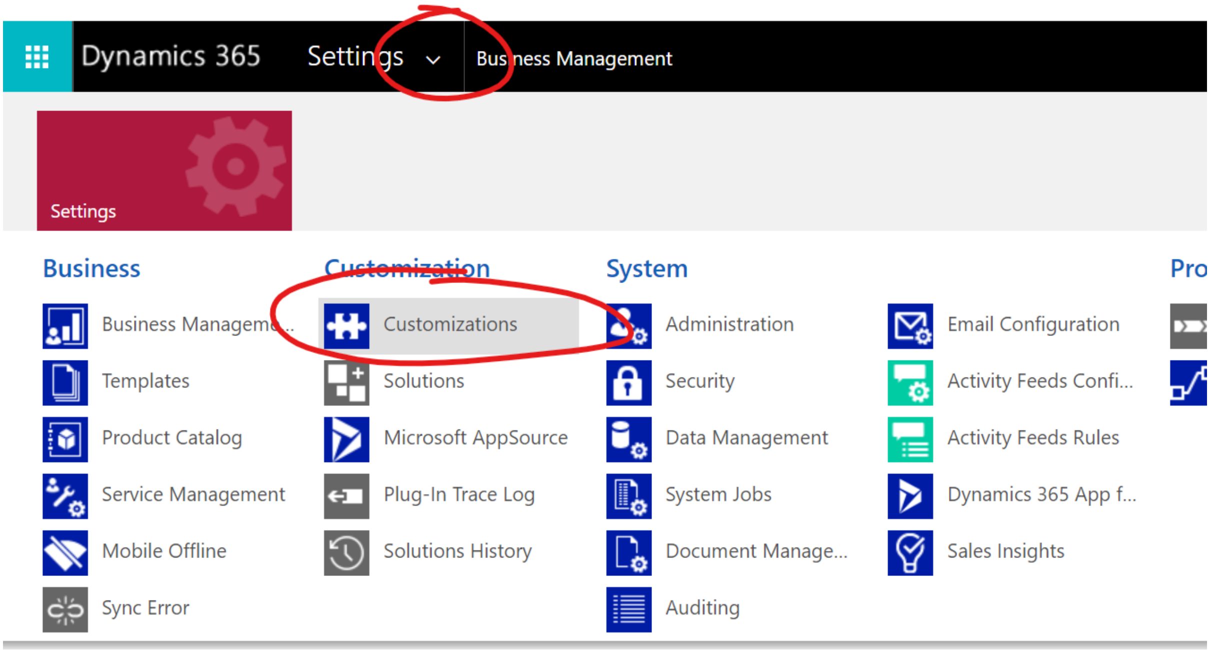
Integration step by step

Adding the web resources

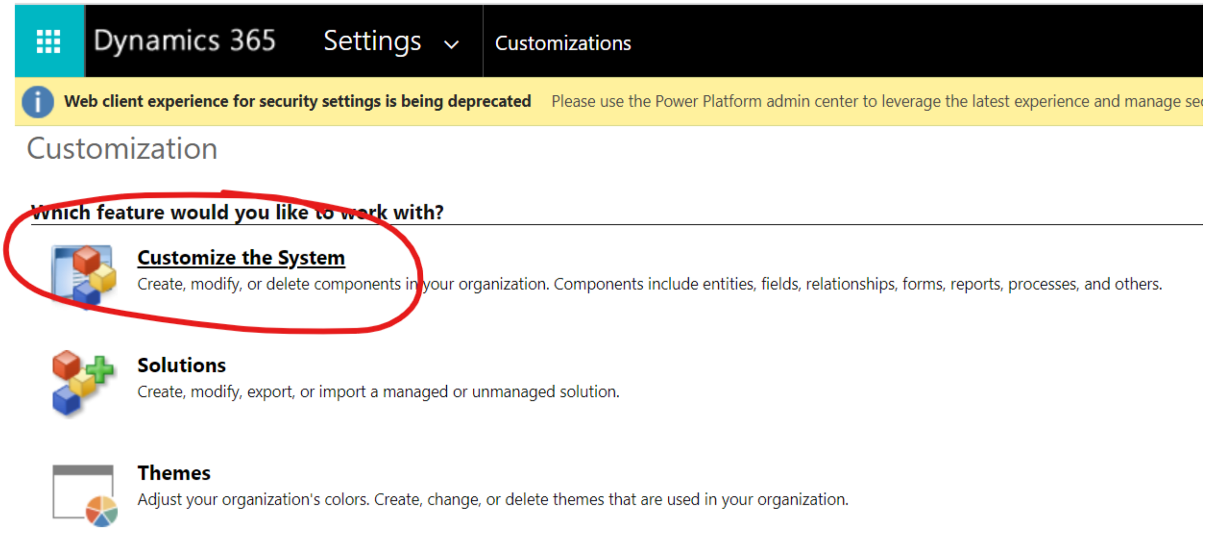
1. On the top right corner of any dynamics page click on the gear icon and select advanced settings. The settings page will load



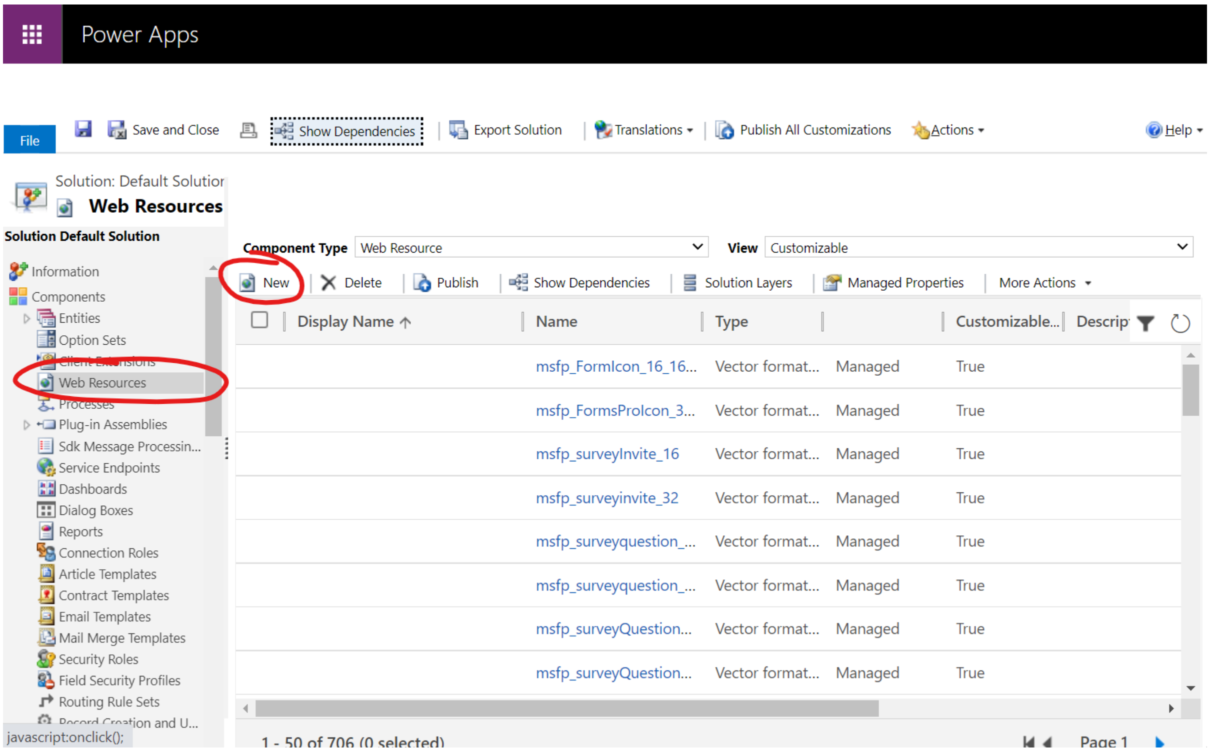
2. On the settings page, open the “Customizations” page. To do this, opens the dropdown menu by selecting the sign next to “Settings”. After that select “Customizations”.



3. On the next page, select “Customize the System”. This will open a pop-up window called “Power Apps”

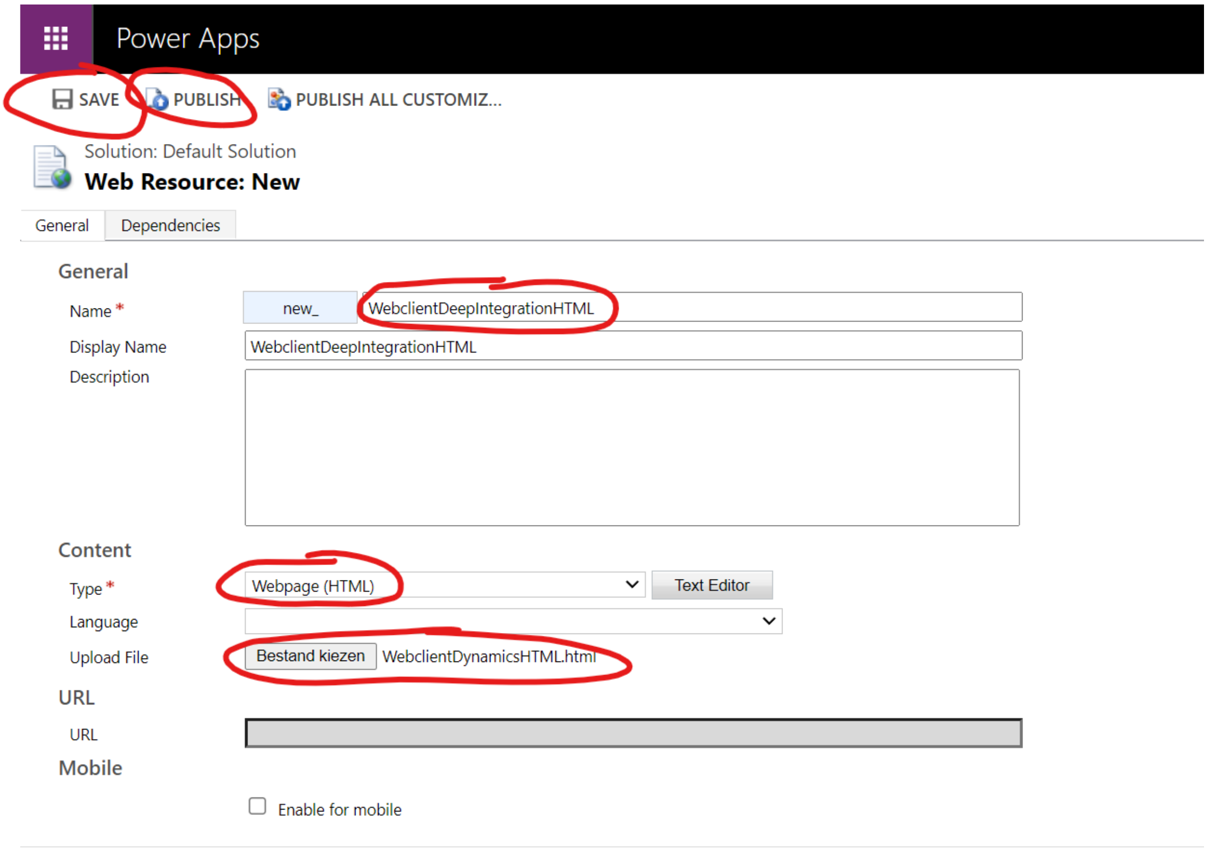


4. In this step we will create 2 new web resources. The first is an html page. The second is a function that can load in the html page.
In the “Power Apps” pop-up window select “Web Resources” in the vertical menu bar on the left. After that Select “New”. This will create another pop-up window.



5. In the newly opened pop-up window, we will create a new web resource. The first is the html page. To do this:
   - Enter a WebResource Name and remember this, for example: “WebclientDeepIntegrationHTML”.
   - Set the Content Type to “Webpage (HTML)”
   - Select upload a file and select the “The deep integration configuration file” that was discussed in the beginning of this document.

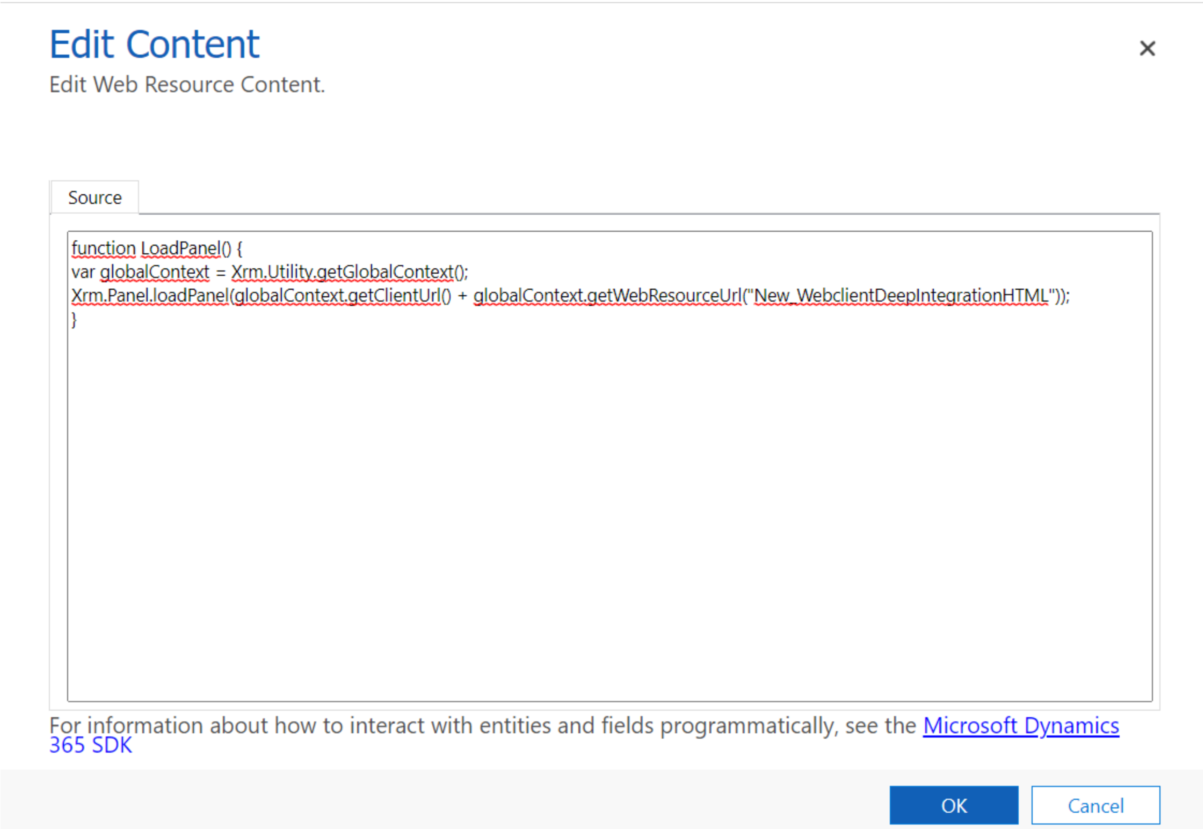
- Press the “SAVE” button.
- Press the “PUBLISH” button.
- Close the “New Web Resource” pop-up window.



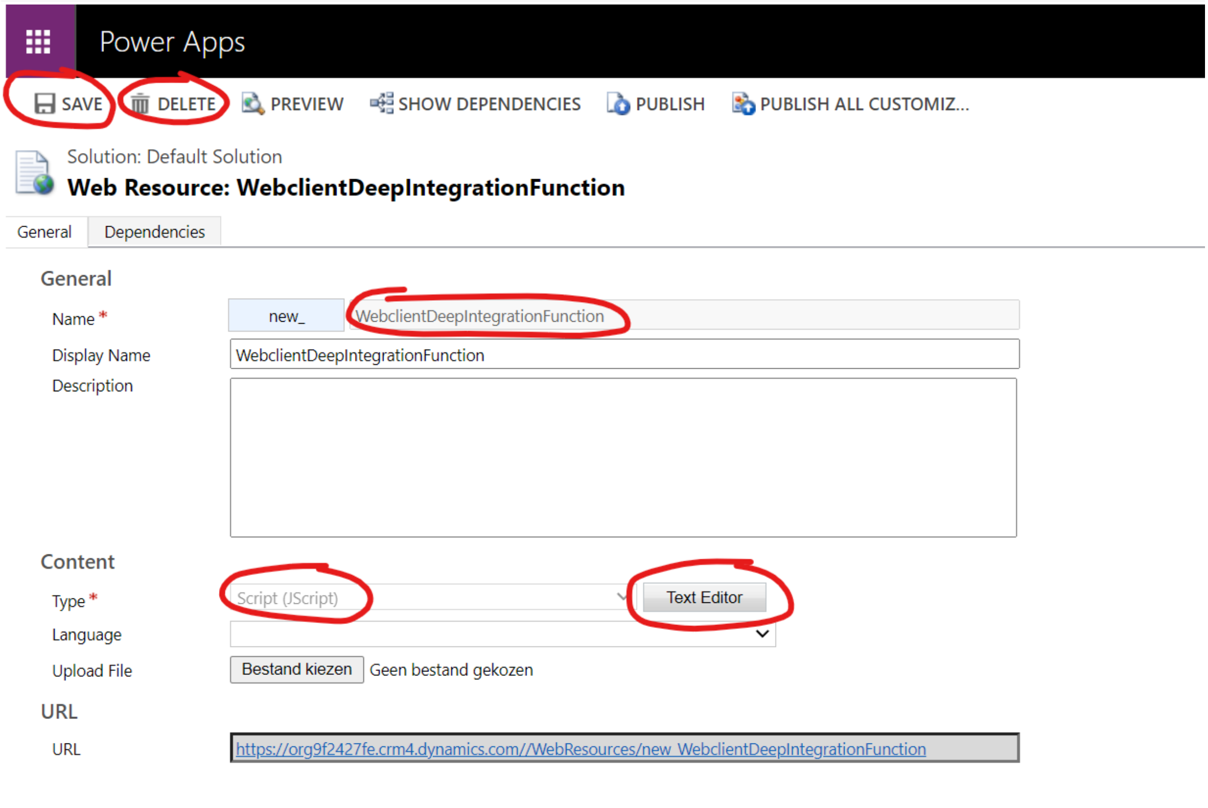
6. At step 5 a new web resource was created of type HTML. Now we will create another web resource. Read the end of step 4 about how to create a new web resource. Once a new op-up window is opened, do the following:
   - Enter a WebResource Name and remember this, for example: “WebclientDeepIntegrationFunction.
   - Set the Content Type to “Script (Jscript)” And select “Text Editor” To enter the script. A new pop-up window will open. The following part can be copy pasted as the script. Please keep in mind that the green text in this function "WebclientDeepIntegrationHTML" Needs to be replaced with the exact web resource name of the web resource created in step 5. Also remember that the double quotes are required. It should look like this:

```
function LoadPanel() {
      var globalContext = Xrm.Utility.getGlobalContext();
      Xrm.Panel.loadPanel(globalContext.getClientUrl() +
globalContext.getWebResourceUrl("New_WebclientDeepIntegrationHTML"));
}
```

   - Press the “SAVE” button.
   - Press the “PUBLISH” button.
   - Close the “New Web Resource” pop-up window.

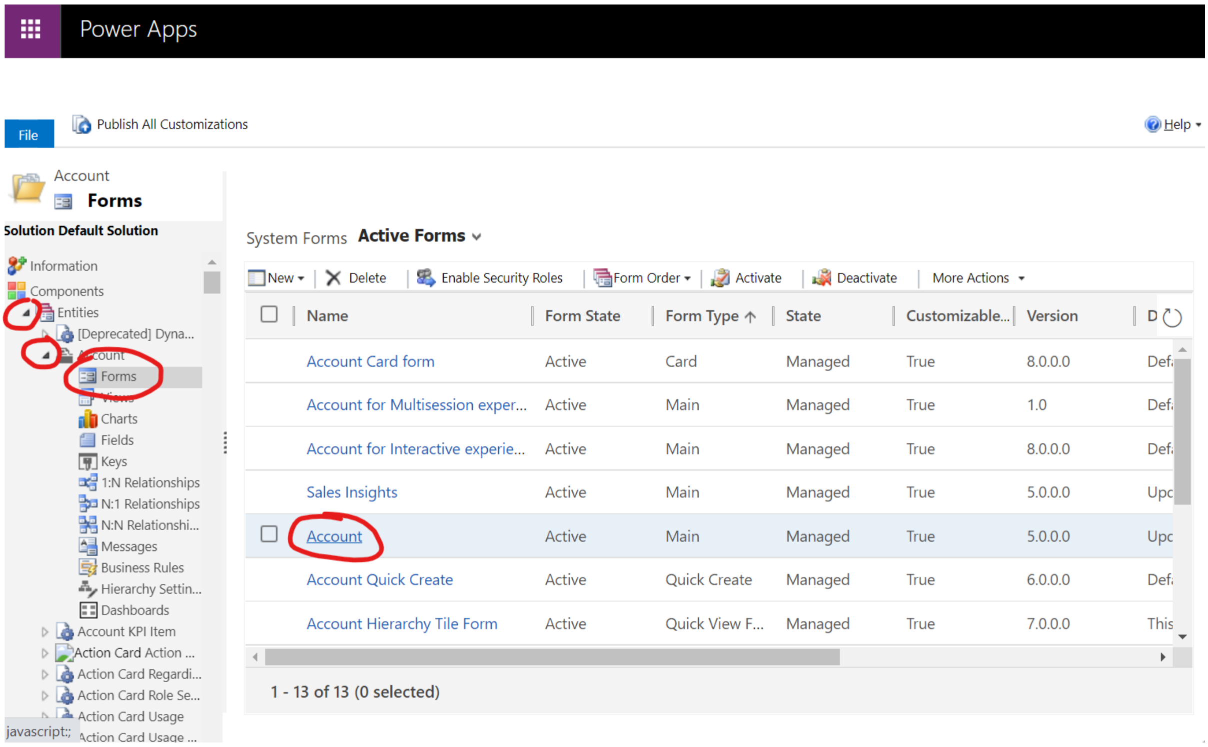

Edit Content
Edit Web Resource Content.
Source
function LoadPanel() {
var globalContext = Xrm.Utility.getGlobalContext();
Xrm.Panel.loadPanel(globalContext.getClientUrl() + globalContext.getWebResourceUrl("New_WebclientDeepIntegrationHTML"));
}
For information about how to interact with entities and fields programmatically, see the Microsoft Dynamics 365 SDK
OK
Cancel

-

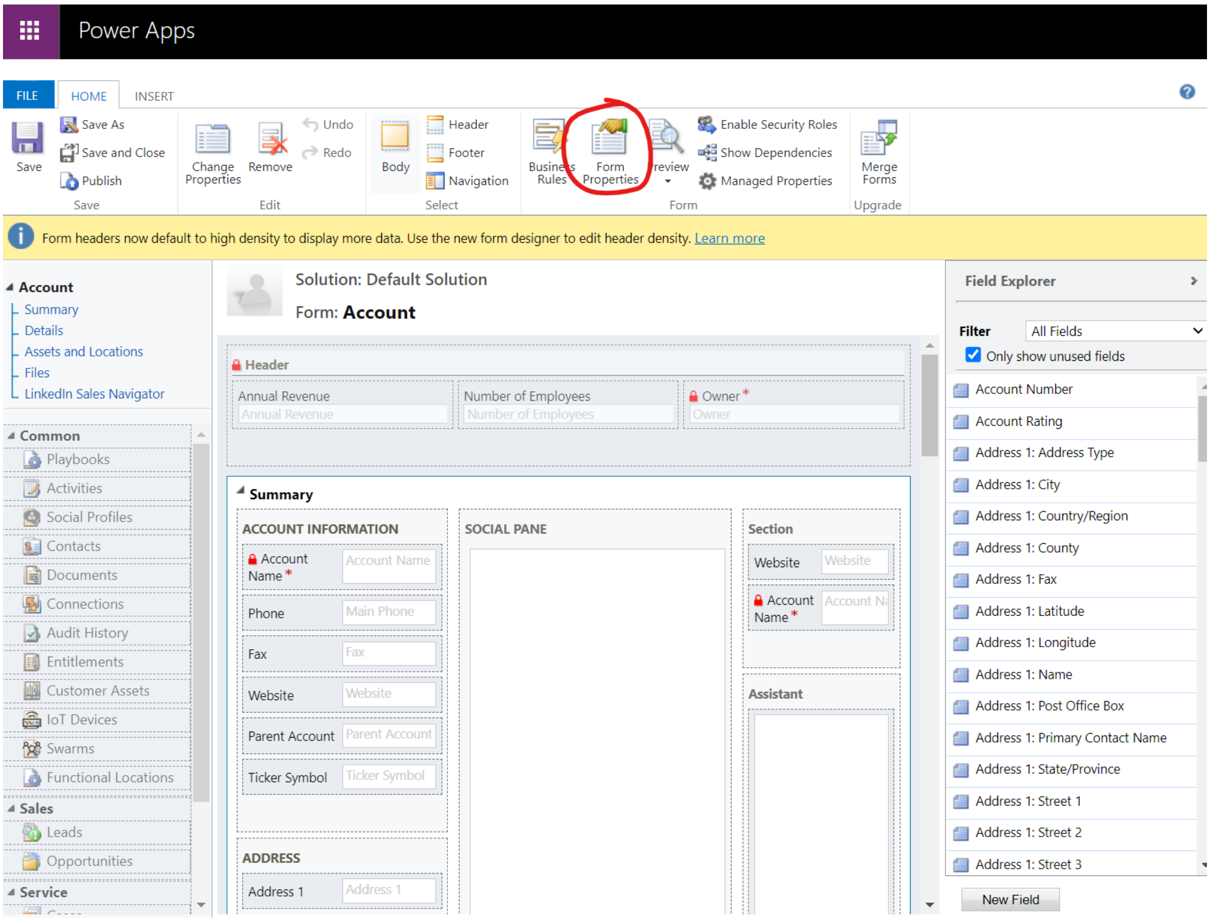

Power Apps
SAVE
DELETE
PREVIEW
SHOW DEPENDENCIES
PUBLISH
PUBLISH ALL CUSTOMIZ...
Solution: Default Solution
Web Resource: WebclientDeepIntegrationFunction
General
Dependencies
General
Name *
new_
WebclientDeepIntegrationFunction
Display Name
WebclientDeepIntegrationFunction
Description
Content
Type *
Script (JScript)
Text Editor
Language
Upload File
Bestand kiezen
Geen bestand gekozen
URL
URL
https://org9f2427fe.crm4.dynamics.com//WebResources/new_WebclientDeepIntegrationFunction

Adding the new web resource to your pages

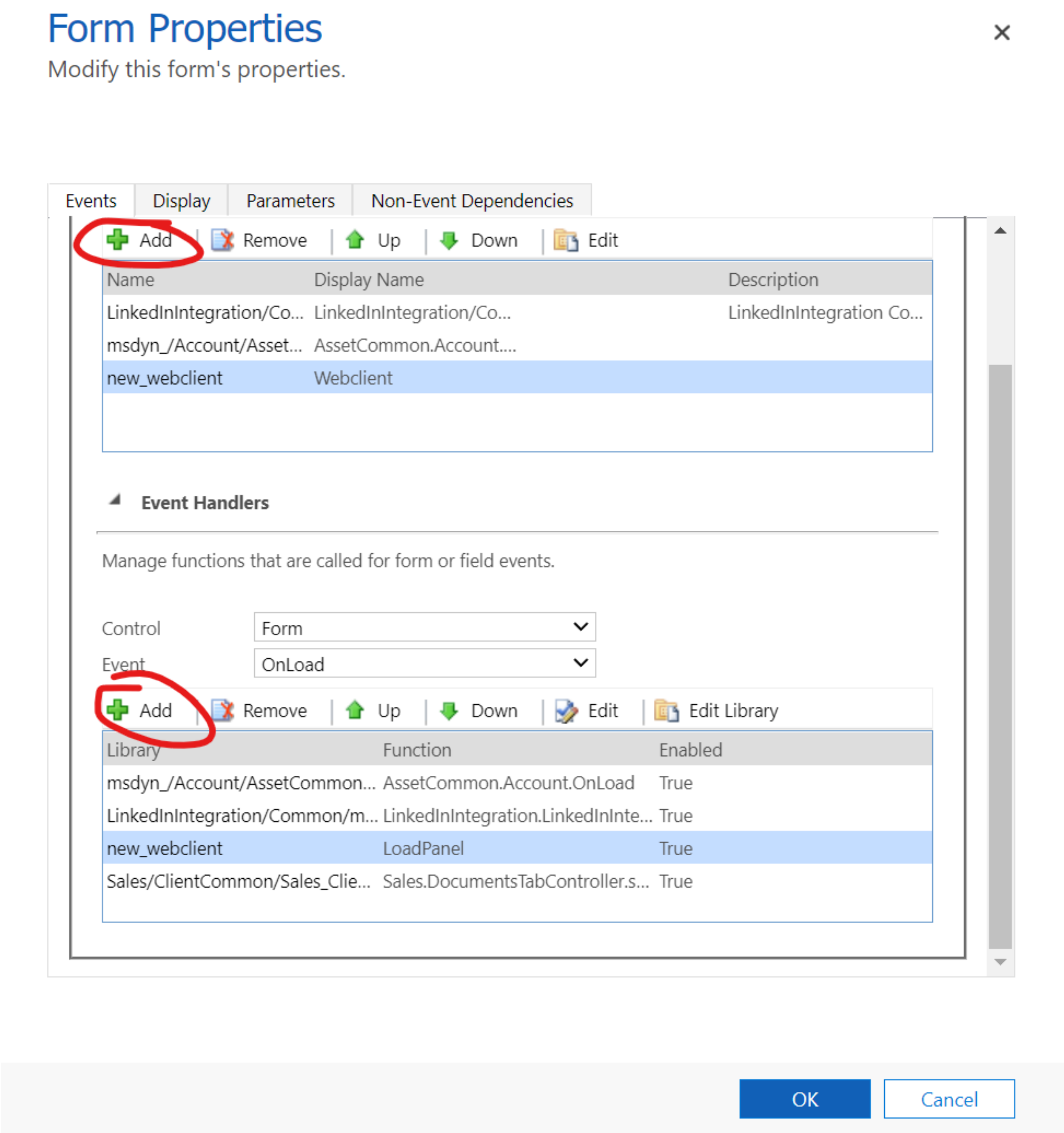
7. We will return to the “Power Apps” pop-up window we opened in step 3. We will now add the embedded integration to a specific Dynamics 365 page. In this example we use the “Account” page, but other pages like the “Contacts” page will work similarly.
   In the vertical menu bar on the left, select the Arrow Icon left of “Entities” to expand the item and show its contents. Next, select the arrow icon next to “Account” to expand that item as well. Select the property “Forms” of “Account”. This will open all the properties of “Forms”. Select Account in the middle of the screen. This will open the “Edit Form page”. We will alter this page with the HTML and function we created in steps 5 and 6.



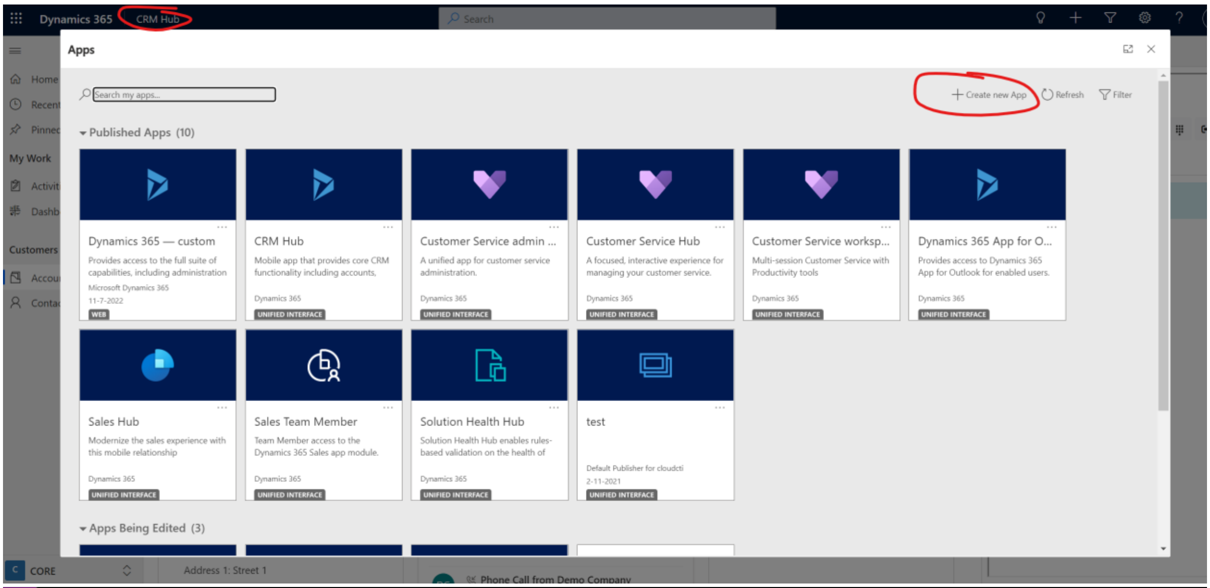
In the top menu bar select “Form properties”. This will open a new pop-up.

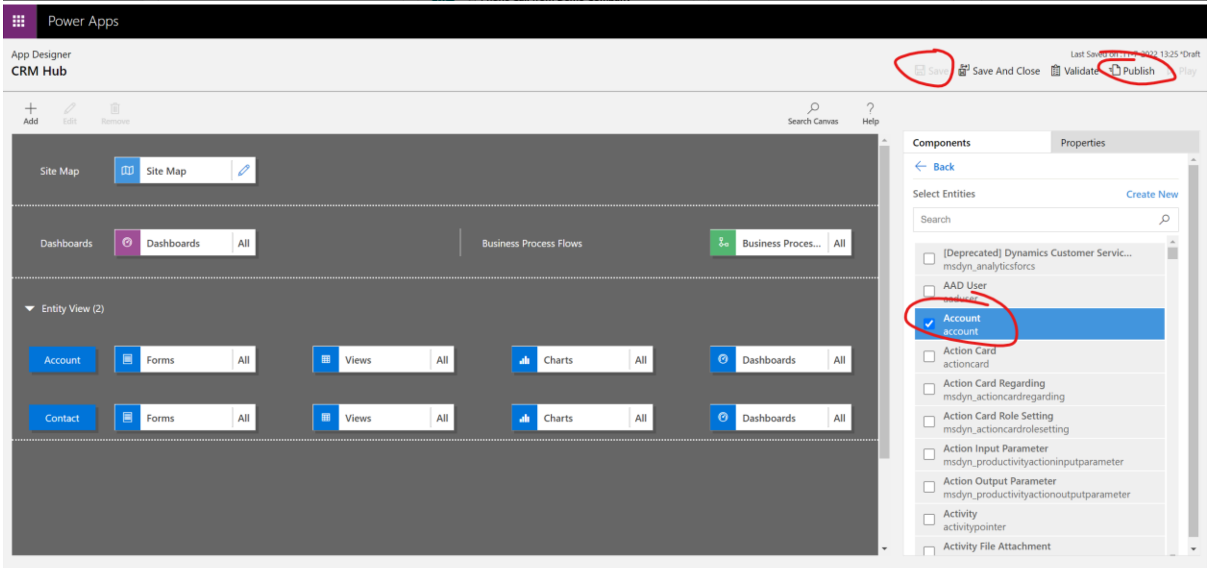


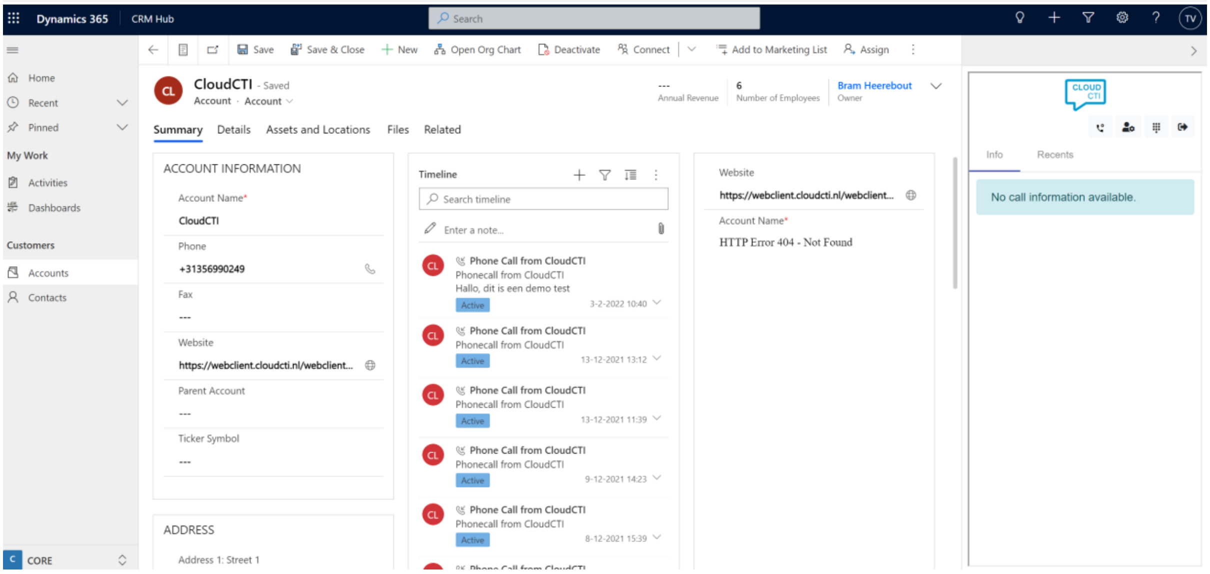
8. In the new pop-up, the tab on the top should say “Events”. Click the “Add” button that is near the top. This will open a pop-up. In this pop-up search for the name of the web resource that was added on step 6. Add that web resource. Press “OK” to close the pop-up. After that press the “Add” button in the bottom half of the page in the event handler’s section. This will open another pop-up. In the “Library” dropdown button, search the web resource that we just added in the beginning of this step. Select it. In the text field named “Function” type in “LoadPanel”. Press “OK” to close the pop-up window. Again press “OK” to close the pop-up window. This will have added the embedded client to Dynamics 365 Account pages. You can repeat these two steps later for all other pages you would like to add the embedded integration to.



9. The last step is to actually show the embedded client inside dynamics. Go to Dynamics 365, open the “Apps” window and create or edit a current one in the “App Designer”. This will open a new window. In this window Select “Entities” on the right. This will open all entities. Then select the entities that were edited in step 9. Then press “Save” and “Publish”. Select the edited app and go to an Account inside Dynamics. The embedded client will show up there.


Dynamics 365
CRM Hub
Search
Apps
Search my apps...
Create new App
Refresh
Filter
Published Apps (10)
Dynamics 365 — custom
Provides access to the full suite of capabilities, including administration
Microsoft Dynamics 365
11-7-2022
WEB
CRM Hub
Mobile app that provides core CRM functionality including accounts,
Dynamics 365
UNIFIED INTERFACE
Customer Service admin ...
A unified app for customer service administration.
Customer Service Hub
A focused, interactive experience for managing your customer service.
Customer Service worksp...
Multi-session Customer Service with Productivity tools
Dynamics 365 App for O...
Provides access to Dynamics 365 App for Outlook for enabled users.
Sales Hub
Modernize the sales experience with this mobile relationship
Sales Team Member
Team Member access to the Dynamics 365 Sales app module.
Solution Health Hub
Solution Health Hub enables rules-based validation on the health of
test
Default Publisher for cloudcti
2-11-2021
Apps Being Edited (3)
Home
My Work
Customers
CORE
Address 1: Street 1
Phone Call from Demo Company


Power Apps
App Designer
CRM Hub
Save
Save And Close
Validate
Publish
Add
Edit
Remove
Search Canvas
Help
Site Map
Dashboards
Business Process Flows
Business Proces...
All
Entity View (2)
Account
Contact
Forms
Views
Charts
Components
Properties
Back
Select Entities
Create New
Search
[Deprecated] Dynamics Customer Servic...
msdyn_analyticsforcs
AAD User
Account
account
Action Card
actioncard
Action Card Regarding
msdyn_actioncardregarding
Action Card Role Setting
msdyn_actioncardrolesetting
Action Input Parameter
msdyn_productivityactioninputparameter
Action Output Parameter
msdyn_productivityactionoutputparameter
Activity
activitypointer
Activity File Attachment


Dynamics 365
CRM Hub
Search
Save
Save & Close
New
Open Org Chart
Deactivate
Connect
Add to Marketing List
Assign
Home
Recent
Pinned
My Work
Activities
Dashboards
Customers
Accounts
Contacts
CloudCTI - Saved
Account · Account
Annual Revenue
6
Number of Employees
Bram Heerebout
Owner
Summary
Details
Assets and Locations
Files
Related
ACCOUNT INFORMATION
Account Name*
CloudCTI
Phone
+31356990249
Fax
Website
https://webclient.cloudcti.nl/webclient...
Parent Account
Ticker Symbol
ADDRESS
Address 1: Street 1
Timeline
Search timeline
Enter a note...
Phone Call from CloudCTI
Phonecall from CloudCTI
Hallo, dit is een demo test
Active
3-2-2022 10:40
13-12-2021 13:12
13-12-2021 11:39
9-12-2021 14:23
8-12-2021 15:39
Account Name*
HTTP Error 404 - Not Found
CLOUD CTI
Info
Recents
No call information available.
CORE