

How to configure caller recognition and screen-pop for:

Microsoft Dynamics 365

Contact replication method: HTTP REST API

Screen pop method: Generated URL

Prerequisites

The Microsoft Dynamics 365 integration uses the Dynamics HTTP REST API for the caller recognition and screen pop. During the installation you will be prompted to enter Service Root URL and grant permission to access the API through OAuth.

The Service Root URL can be found in Dynamics via:

Settings > Customizations > Developer Resources

Developer Resources

Getting Started

[Developer Center](#)

[Developer Forums](#)

[SDK NuGet Packages](#)

[SDK Download](#)

[Sample Code](#)


[Developer Overview](#)

Connect your apps to this instance of Dynamics 365

Instance Web API

[HTTP REST API](#) providing access to this instance of Dynamics 365. For more information see [Microsoft Dynamics 365 Web API](#).

Service Root URL

 [Download OData Metadata](#)

Instance Reference Information

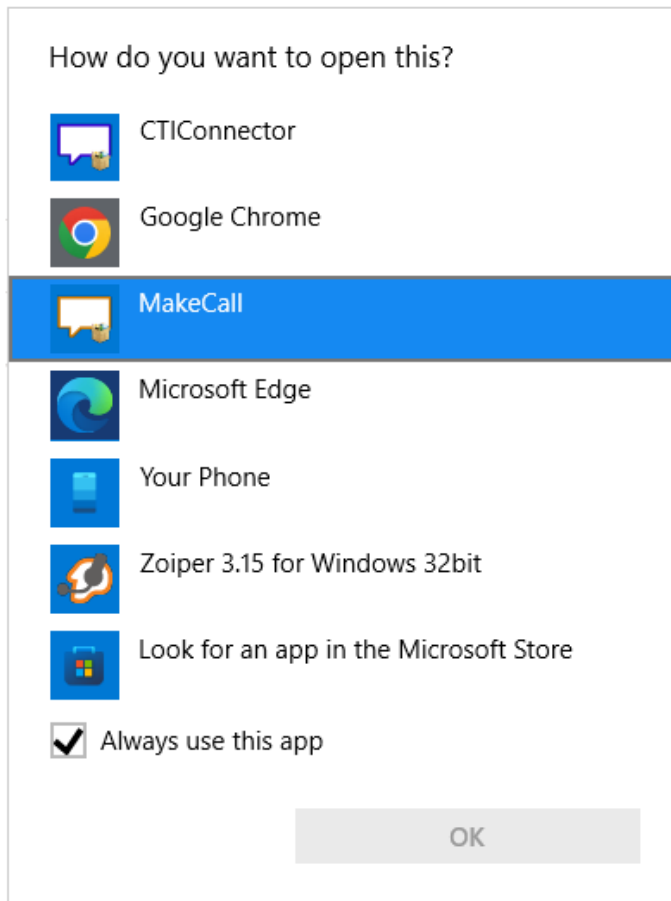
Use this information to uniquely identify this instance of Dynamics 365. You can use this to retrieve the current URL for this instance. For more information see [Azure extensions for Microsoft Dynamics 365](#).

ID

Unique Name

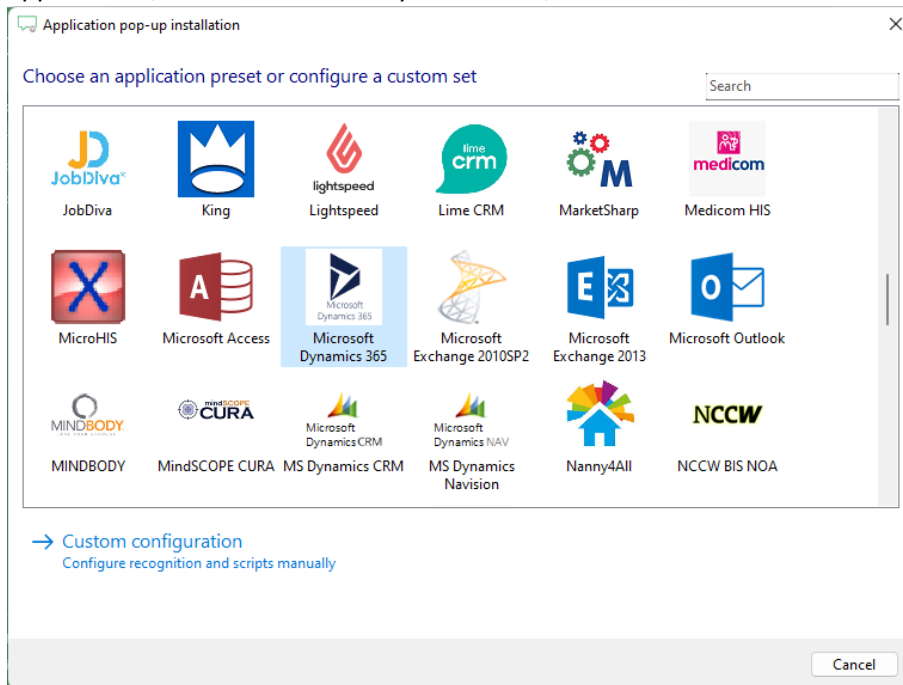
Notes

Outbound dialing from Microsoft Dynamics 365 is easy, just click on a phone number hyperlink to dial. The first time your browser may ask permission to open an app and then show the Application Picker:

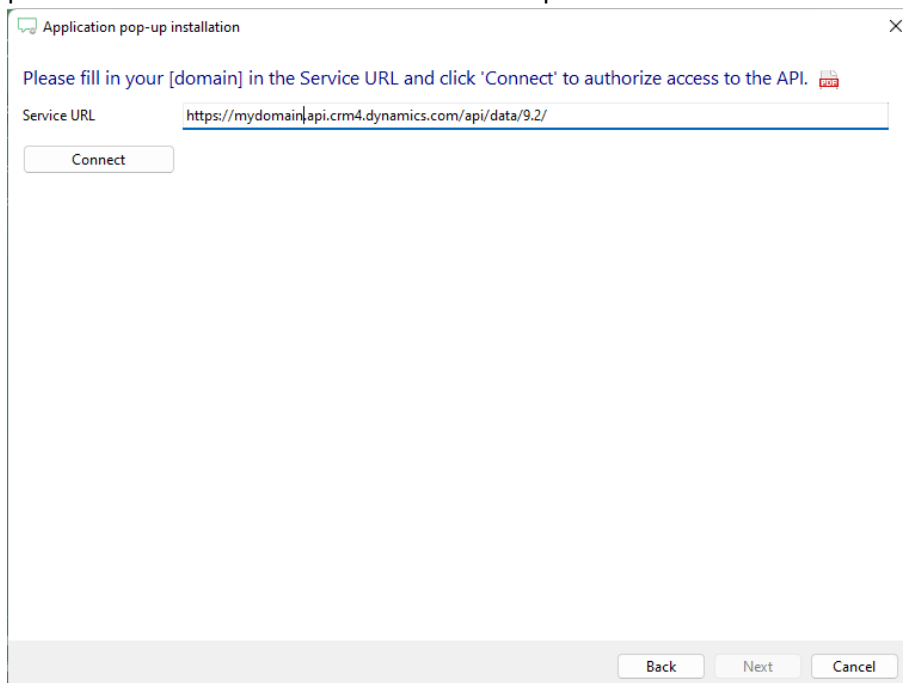


Configuraton steps

- 1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose Microsoft Dynamics 365, as shown below.



- 2) Replace the [domain] part of the default URL with your own domain, or fill in the complete service URL as described in the prerequisites section. Then click 'Connect' to grant access using the OAuth protocol. This can take a few minutes to complete.



- 3) Choose which fields to display in the call notification on an incoming call.

The screenshot shows a window titled 'Application pop-up installation' with a close button (X) in the top right corner. Below the title bar, the section 'Client call notification' is displayed. Underneath, a subtitle reads: 'Configure the information you want the client to show when a caller is recognized from this set'. A preview of the call notification is shown, featuring a blue telephone handset icon and the text 'Incoming call'. Below this, a box contains the following fields: 'Contact name: Name', 'Organization: Organization', 'Number: Caller number', and 'Source: Application name'. An 'Open contact' button is positioned below the preview. A small note states: '* Windows allows a maximum of 4 lines, and a maximum of 128 characters'. At the bottom of the preview area is an 'Add field' button. The bottom of the window features three buttons: 'Back', 'Next', and 'Cancel'.

- 4) The 'Show Contact' Script is preconfigured. Optionally, you can add extra scripts or click 'Next' to continue.

The screenshot shows a window titled 'Application pop-up installation' with a close button (X) in the top right corner. Below the title bar, the section 'Which actions do you want to perform?' is displayed. Underneath, a subtitle reads: 'The 'Show Contact' script is pre-configured. Optionally, you can add extra scripts to the incoming call notification.' A list of actions is shown, starting with 'Show Contact' (indicated by a script icon) with the description 'Open the automatically generated URL to the caller's CRM page.' and a trash icon to its right. Below this is a link '→ Add a new script' with the description 'Choose from a list of predefined scripts or create a custom script'. The bottom of the window features three buttons: 'Back', 'Next', and 'Cancel'.

- 5) Check the configuration summary and click 'Finish' to add the integration with the application.

