

# Contact Microsoft Dynamics Integration

In order to enable agents to answer calls from Horizon Contact within MS Dynamics the following integration needs to be completed.

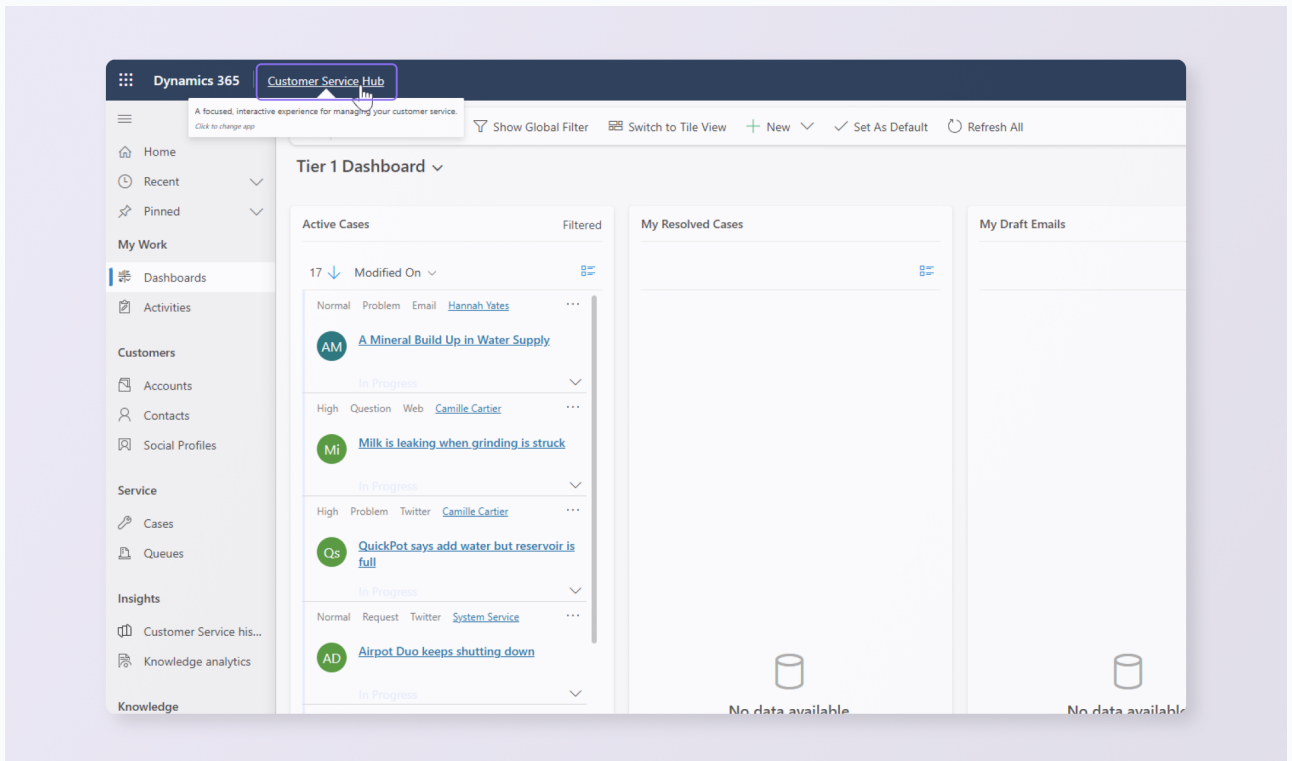
Before completing the integration the following prerequisites are required:

- Purchase the required CRM bolt on via the Gamma Portal for the relevant users - please speak to your service provider
  
- Ensure all users have been assigned the relevant privileges
  
- Set up your Dynamics 365 account - integration with Contact is supported with:
  - Dynamics 365 Customer Service
  
  - Dynamics 365 Sales
  
  - Dynamics 365 Project Service
  
  - Dynamics 365 Field Service

## **Step 1 - Add a new Channel Integration Framework**

The first step is to enable the connection between Microsoft Dynamics and Contact utilising Microsoft's Channel Integration Framework.

**Note:** If this does not appear by default you will need to provision it via the Microsoft AppSource. For more information see FAQs at the bottom of the article.



1. In Dynamics 365 click the current app name

1. Log into **Dynamics 365**

2. Click the **current app name** to view your available apps

3. Select **Channel Integration Framework**

4. Click **New**

5. Fill in the details:

◦ **Name** - This is a name for the Channel Integration Framework

◦ **Label** - This will be visible when the integration is open in MS Dynamics

- **Channel URL** (Depends on the URL being used to log in - see below)
- **Enable Outbound Communication** - set this as **Yes**
- **Channel Order** - Enter **1**

6. For Unified Interface Apps for the Channel select:

- **Customer Service Hub**
- **Solution Health Hub**
- **Sales Hub**

7. Click **Save & Close**

## Channel URL

The channel URL is what links MS Dynamics to Horizon Contact and is constructed using the following formular:

Horizon Contact login URL	+	?msdyn=true&from=	+	MS Dynamics app URL
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The Horizon Contact login URL that is used to create the Channel URL is dependent on the URL that agents use to access Contact when they log in. Agents should look at the URL being used to log in and use that URL to construct the channel URL. This will be either:

- <https://contact.unlimitedhorizon.co.uk/login>
- <https://horizon.contact.gammagroup.co/login>

For the MS Dynamics app URL you need the beginning of the URL until dynamics.com as highlighted in the following

example: <https://orgd57fef41.crm11.dynamics.com/main.aspx?appid=5a3961f3-d196-f011-...>

For example:

<https://contact.unlimitedhorizon.co.uk/login?msdyn=true&from=orgd57fef41.crm11.dynamics.com>

## Step 2 - Configure the Contact communication channel

The next step is to update the Channel Communication Control so that it embeds the Horizon Contact Phone Dialler within Dynamics. This allows agents to make calls through Contact when accessing their Dynamics CRM contacts

1. Click the **settings cog** in the top-right corner
2. Select **Advanced Settings**
3. In the left-hand menu select **Customizations**
4. Select **Customize the system**
5. Select **Entities → Contact → Forms**
6. Select **Contact**

7. In the pop-up double click on **Business Phone**
8. Select the **Controls** tab
9. Click **Add Control**
10. Select **Channel Communication Control**
11. Click **Add**
12. Click the **radio buttons** for Web, Phone and Tablet
13. Click **OK**
14. Repeat **steps 7 to 13** for Mobile Phone
15. Click **Save**
16. Click **Publish**

This will return you to the Forms page where you can repeat these steps for every phone field in every form you might want to use.

## Step 3 - Test the integration

Agents should be able to see a Contact integration by selecting the jigsaw icon in the right-hand menu and can use their Contact login details to access the softphone.

1. Navigate back to your MS Dynamics account
2. Click the **current app name** to view your available apps
3. Select **Customer Service Hub, Sales Hub** or **Solution Health Hub**
4. Click the **jigsaw icon** in the right-hand menu
5. Use your **Contact credentials** to sign in

Agents should now be able to answer calls within MS Dynamics.

**Note:** In order for the integration to succeed third-party cookies need to be enabled. This is because some web browsers block all third-party cookies and local storage access, preventing the integration.

## FAQs

### Channel Integration Framework isn't appearing, what do I do?

If Channel Integration Framework isn't appearing in Dynamics you need to provision it via the Microsoft AppSource.

1. Navigate to Microsoft AppSource and search for Channel Integration Framework or follow [this link](#)

2. Select **Get it now**

3. Confirm your details and click **Get it now**

4. Select **an environment** to install the framework on

5. Tick the **checkboxes** and click **install**

Channel Integration Framework should now appear in your Dynamics accounts.

The screenshot shows the Dynamics 365 user interface. On the left, there is a search bar and a list of available apps. On the right, a dialog box titled 'Install Dynamics 365 Channel Integration Framework' is open. The dialog box contains the following information:

- Name:** Dynamics 365 Channel Integration Framework
- Description:** The Dynamics 365 Channel Integration Framework is a set of APIs (methods, events and protocols) that enables developers and partners to build immersive communication experiences such that third party communication widgets running on channel provider/partner... [See more](#)
- Publisher:** Microsoft Dynamics 365
- Select an environment \*:** A dropdown menu with the following options: ContactCenter Trial, Sales Trial.

The 'Install' button is highlighted in blue.

Select the relevant environment from the dropdown

