

5.8 Configuration

Bright Pattern Documentation

Generated: 1/24/2022 5:49 am

Content is available under license unless otherwise noted.

Table of Contents

Table of Contents	2
Overview	3
Prerequisites	3
Configuration Section A: Enable Scenarios and Access to Dynamics 365	3
Step 1: Add a new registered app	3
Step 2: In Bright Pattern, create a Dynamics 365 integration account	5
Step 3: Get the Application (client) ID	6
Step 4: Get the client secret	7
Step 5: Get the Authorization URL and OAuth 2.0 token	8
Step 6: Add users to the app	10
Step 7: Add API access	11
Step 8: Complete integration account properties setup	13
Configuration Section B: Enable Agent Desktop Integration	14
1. Install Channel Integration Framework app	15
2. Install Bright Pattern Omnichannel Contact Center Solution app	16
3. Configure Channel Integration Framework app	17
4. Configure Click-to-Call functionality (optional)	21
5. Add Bright Pattern activity history fields to forms (optional)	28
Reference: How to Add an Integration Account	36
Step 1: Add new account	37
Step 2: Edit properties	37
Type	38
Name	38
Default account	38
Authorization URL	38
Token URL	38
API URL	38
Client ID	38
Client Secret	38
Refresh token	39
Test connection	39
Step 3: Save!	39
Configuring Screen Pop for Preview Campaigns	39
Prerequisites	39
1. Create a list with a column for Dynamics object IDs	39
How do I locate the object ID?	40
2. Configure an outbound Preview campaign	40
2a. Configure the Screenpop URL	41
3. Start the campaign	42
Troubleshooting	42
Enable Single Sign-On	42

Overview

To integrate Microsoft Dynamics 365 in your Bright Pattern Contact Center operations, you should complete our integration configuration steps in the following order:

1. [Configuration Section A: Enable Scenarios and Access to Dynamics 365](#)
2. [Configuration Section B: Enable Agent Desktop Integration](#)
3. [Reference: How to Add an Integration Account in Bright Pattern](#)
4. [Optional: Configuring Screen Pop for Preview Campaigns](#)
5. [Enable Single Sign-On](#)

Prerequisites

To configure Microsoft Azure and the Dynamics 365 CRM for Web API access, you must have login credentials for Microsoft's portal at portal.office.com. If you are unable to log into Microsoft directly, please contact your Microsoft system administrator to review permission and access level settings. You must have administrative privileges to create registered applications and enterprise applications.

You must have access to your organization's Dynamics 365 CRM with proper security roles and global administrator privileges.

Bright Pattern Contact Center version 5.3.5 or later is required.

For your Dynamics 365 environment, note that the majority of sales and customer service core functionalities have moved to the Unified Interface client; other client types will be discontinued in 2020. We recommend switching to the [Unified Interface](#) client.

Configuration Section A: Enable Scenarios and Access to Dynamics 365

Step 1: Add a new registered app

Adding a new registered app allows the Microsoft Azure Active Directory to communicate to Bright Pattern Contact Center software via Dynamics 365. This step also enables the integration of scenarios.

1. In the *Azure Portal* > *Azure Active Directory* > *App Registrations*, click + **New registration** to add a new registered app.
2. Give this app a name.

3. In section *Supported Account Types*, choose who can use this application or access this API. In this example, we are choosing "Accounts in this organizational directory only."

MS1-App-Registry.PNG



4. In section *Redirect URI*, select **Web** and include a link to our callback file in the following format:

`https://<tenant>/admin/msdynamicscallback.html`

(e.g., "<https://example.brightpattern.com/admin/msdynamicscallback.html>")

MS2-Redirect-URI.PNG



5. Click **Register**.
6. The new registered app's *Overview* page will open.

MS2-App-Overview.PNG



Step 2: In Bright Pattern, create a Dynamics 365 integration account

At this point, we will be linking the registered app to Bright Pattern Contact Center by copying values from your registered app and pasting them into your [Bright Pattern Dynamics 365 integration account](#). To facilitate easy copying and pasting from one app to the other, we recommend keeping the Bright Pattern Contact Center Administrator application open in a separate browser tab.

1. In a new tab, sign in as admin to **<https://<tenant>.brightpattern.com/admin>**
2. Go to *Call Center Configuration > Integration Accounts* and click + to add a new integration account.
3. Select **Microsoft Dynamics 365** as the account type.
4. The Microsoft Dynamics 365 integration account properties will open.

[MS13-Integration-Account.PNG](#)



5. Keep the properties window handy because this is where you will be pasting Dynamics 365 values in later steps.

Step 3: Get the Application (client) ID

After the registered app is created, you will need its Application (client) ID, which is the unique identifier of the app.

1. In the Microsoft Azure portal, view the registered app's *Overview* page.
2. Locate the **Application (client) ID** and copy this value.

[MS3-Client-ID.png](#)



3. Tab over to *Bright Pattern Contact Center > integration account properties*.
 1. In field **Client ID**, paste the value you just copied.

MS4-Integration-a.png

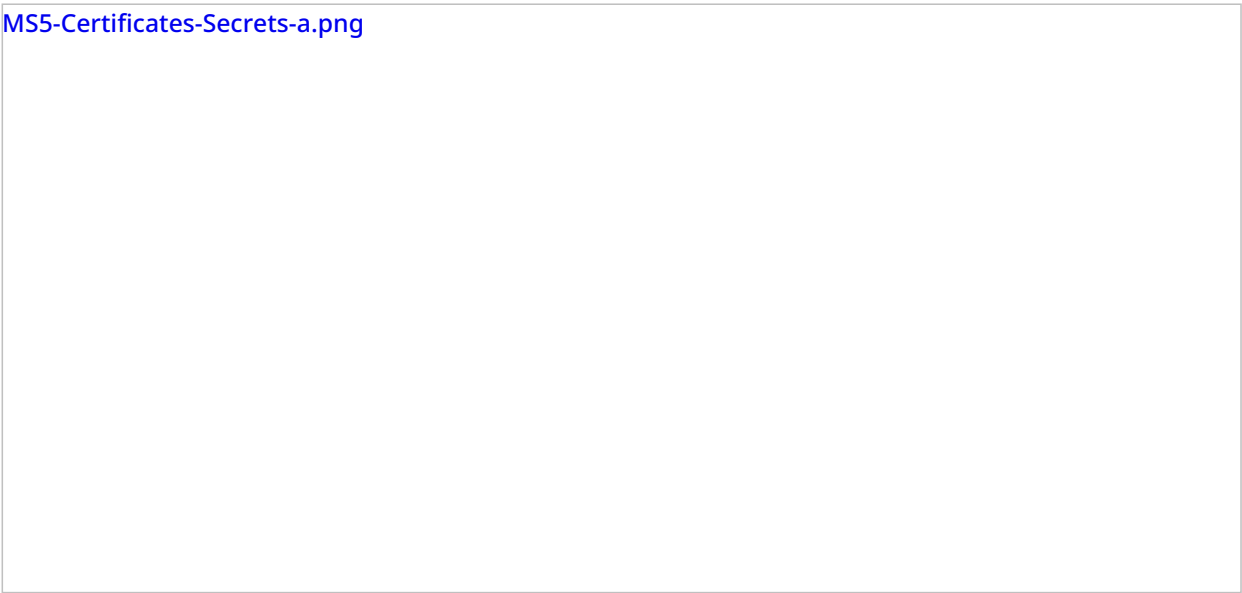


Step 4: Get the client secret

The client secret is your registered app key.

1. In the Azure portal, in the registered app, go to *Manage > Certificates & secrets*.

MS5-Certificates-Secrets-a.png



2. Required: Click + New client secret to open the Add a client secret dialog.
 1. In *Description*, add any description
 2. In *Expires*, set to **Never**.
 3. Click **Add**.

MS6-Client-Secret.PNG



3. The client secret will be created and shown. Copy the client secret now because you will never see it again.
4. Tab over to *Bright Pattern Contact Center > integration account properties*.
 1. In field **Client Secret**, paste the value you just copied.

MS4-Integration-b.png



5. Optional: If your organization has a certificate, you can click **Upload certificate** to add a certificate (public key) in .cer, .pem, .crt format at this time. This is done in the Azure portal, in the registered app, in *Manage > Certificates & secrets*.

Step 5: Get the Authorization URL and OAuth 2.0 token

1. In the Azure portal, in the registered app, go to *Overview* and click **Endpoints**.

[MS6-Auth-Endpoints-a.png](#)



2. In the *Endpoints* dialog that opens, you will be copying two values.

[MS7-Endpoints-2.png](#)



3. First, copy the value for OAuth 2.0 authorization endpoint (v1).
 1. Tab over to *Bright Pattern Contact Center > integration account properties*.
 2. In field **Authorization URL**, paste the value you just copied.

MS4-Integration-c.png



4. Second, copy the value for **OAuth 2.0 token endpoint (v1)**.

1. Tab over to *Bright Pattern Contact Center > integration account properties*.
2. In field **Token URL**, paste the value you just copied.

MS4-Integration-d.png



Step 6: Add users to the app

In the Azure portal, you will need to add users who have permission to use this application (i.e., users who will log into the Dynamics instance and use Microsoft's API). We recommend adding system users and yourself and/or at least one user who will act in an admin capacity (i.e., changes made by scenarios will be made on behalf of this user).

1. In the Azure portal, in the registered app, go to *Azure Active Directory > Enterprise applications* and select your registered app from the list of all applications shown.

2. Then go to *Manage > Users & Groups*.
3. Click + **Add user** to add yourself as a user to the application.

[MS7-Users-a.png](#)



4. In the *Add assignment* section on the right-hand side of the screen, you will be selecting yourself as a user who can access this application.
5. Select your name from the *Users list*.
6. Set **Default access** so that you can complete configuration. Changes made by scenarios will be made on behalf of this user. If you would like to customize access, you may click on **Properties** to set something other than default access.
7. Click **Select** for the user.
8. Click **Assign**.

Step 7: Add API access

1. Go to *Azure Active Directory > App registrations* and select your app name.
2. Then select **API permissions** and click + **Add a permission**.

[MS8-Permission-a.png](#)



3. In *Request API permissions*, click the tab called **APIs my organization uses** and search for “Common Data Service.”
4. When it appears in the list, select **Common Data Service**.

[MS11-Common-Data-2.png](#)



1. Note: If you have more than one application using Common Data Service, make sure you select the Dynamics app and *not* the PowerApps app.
5. In the next screen that opens:

MS12-Common-Permissions.PNG



1. Select **Delegated permissions**, which means your app has to access the API as a signed user.
2. Check box for **user_impersonation**, which means you give permission to access the Common Data Services API.
3. At bottom of screen, click **Add permissions**.

Step 8: Complete integration account properties setup

1. Tab over to *Bright Pattern Contact Center > integration account properties*.
2. **Name** the integration account.
3. Select checkbox for **Default account** if you will have multiple Dynamics 365 integration accounts and you want this one to be used as default.
4. In **API URL**, set the URL in the following format:

`https://<your-organization>.crm.dynamics.com/api/data/v9.0`

MS4-Integration-e.png



5. Next to Refresh token, click **Request token**.
6. In a pop-up dialog, you will be asked to authenticate your Microsoft account. Click **consent on behalf of your organization**.
7. If all goes well, a dialog will show, "Connection is valid." After this step is completed, you will be able to use Microsoft blocks in scenarios.
8. Click **Apply** to save your integration account properties.

For more information, see section [How to Add an Integration Account](#).

This part of configuration is now complete.

Configuration Section B: Enable Agent Desktop Integration

Our integration uses Microsoft's Channel Integration Framework for Dynamics 365 to embed Bright Pattern's Agent Desktop widget into Dynamics 365 applications for real-time communications and access to Dynamics 365 data from a single screen.

This framework enables third-party channel providers like Bright Pattern to integrate with Dynamics 365 Unified Interface Apps^[1] using a browser-based JavaScript API library, and in turn, provide communication experiences via a third-party communication widget like Agent Desktop.

The following instructions will show you how to configure your Bright Pattern Contact Center to be an active channel provider and interact with Dynamics 365 via the Agent Desktop widget.

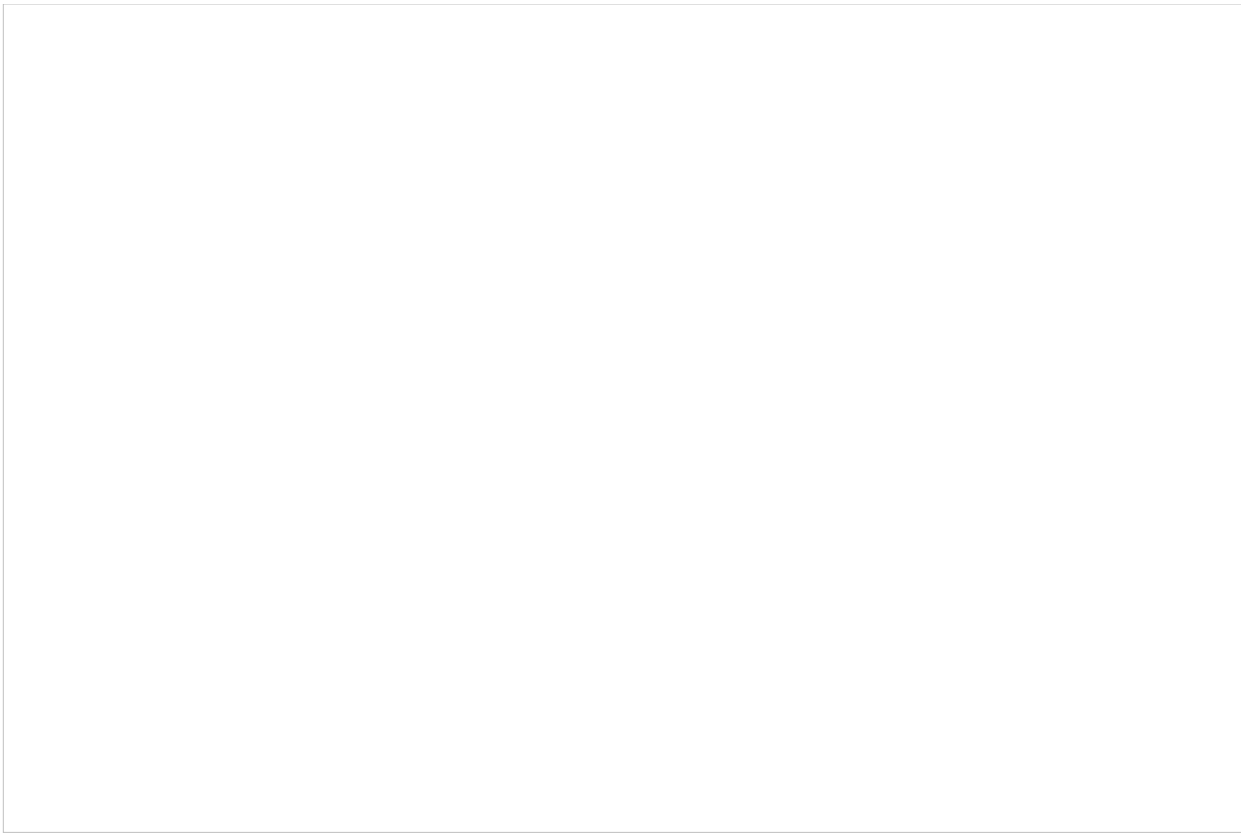
1. Install Channel Integration Framework app

1. Sign in to your Dynamics 365 instance. **Note:** You must be logged in as a user with admin privileges.
2. Go to *Home* > *AppSource*, search for **Channel Integration Framework**, and click **Get it now**. This will begin the installation process. Note that the Channel Integration Framework is required for supporting the Bright Pattern application (see Step 2 below).



AppSource > Channel Integration Framework

3. Wait for installation to be complete. Depending on what region your Dynamics 365 instance is in, installation may take some time. You can check the progress of the installation by refreshing the *Manage Solutions* page.

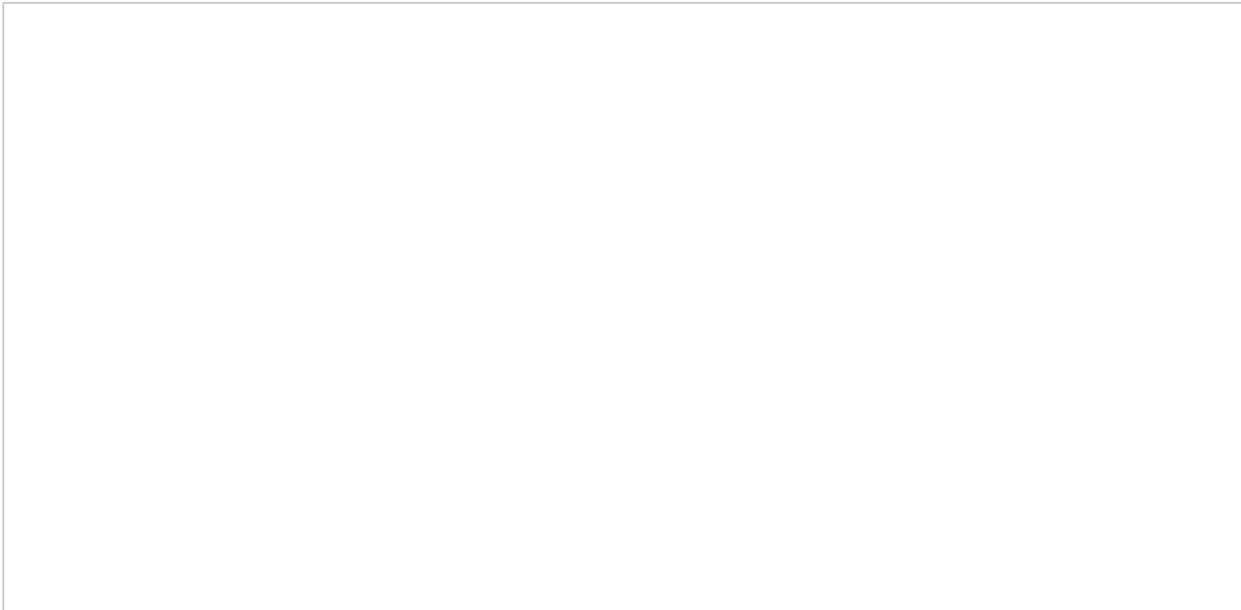


Manage your Solutions page

2. Install Bright Pattern Omnichannel Contact Center Solution app

Once the Channel Integration Framework app is installed and configured, you can install the Bright Pattern Omnichannel Contact Center Solution application. This app allows communication between Bright Pattern Contact Center and Microsoft Dynamics 365.

1. In Microsoft's [AppSource](#), click **Get More Apps**, and search for "Bright Pattern Omnichannel Contact Center Solution."



Bright Pattern Omnichannel Contact Center Solution app information

2. Click **GET IT NOW** to add the application to Dynamics 365. You can check the progress of the installation by refreshing the *Manage Solutions* page.



Installation of app

3. Configure Channel Integration Framework app

1. In your Dynamics instance, from the side menu, select **Channel Integration Framework**.



Channel Integration Framework app

- 2. On the *Active Channel Providers* page, click **+New**.



Add new active channel provider

3. On the *New Channel Provider* properties page, set the following:



New channel provider properties

1. **Name** - Any string (e.g., "Bright Pattern")
2. **Label** - Any string (e.g., "My Bright Pattern integration")
3. **Channel URL** - Set the URL in the following format, where "<tenant>" is your contact center name, and "<your_Dynamics_365_CRM>" is your Dynamics 365 domain address (which matches the domain of the Dynamics 365 URL address field):

`https://<tenant>.brightpattern.com/agentdesktop/MicrosoftD365.jsp?crmDomain=<your_Dynamics_365_CRM>.crm.dynamics.com`

For example:

<https://example.brightpattern.com/agentdesktop/MicrosoftD365.jsp?crmDomain=brightpattern.crm.dynamics.com>

4. **Enable Outbound Communication** - Select "Yes" to enable click-to-call functionality
 5. **Channel Order** - Any integer (e.g., "0")
 6. **API Version** - Select "1.0"
 7. **Select Unified Interface Apps for the Channel** - Select all the apps that will use this channel integration framework (i.e., the apps where Agent Desktop will be embedded)
 8. **Select the Roles for the Channel** - Select the desired security roles for accessing the integration.
4. Click **Save and Close** to make the channel provider active. You should now see yourself as an Active Channel Provider in the list.
 5. Make sure that the Agent Desktop widget is indeed embedded in your Dynamics 365 app.
 6. From the left-side menu, select a Dynamics 365 app that you have just configured to use Channel Integration Framework.
 7. You should see Agent Desktop login screen embedded as a frame. Try signing in!



Dynamics 365 with embedded Agent Desktop

If you do not see Agent Desktop, go back to Active Channel Providers > Channel URL property and make sure that the URL includes the correct tenant name and CRM domain.

4. Configure Click-to-Call functionality (optional)

Click-to-call functionality allows you to dial outbound by simply clicking on a phone icon beside a contact's name in your Dynamics 365 instance. Note that click-to-call must be enabled *on every form that you will use in Dynamics 365*.

Although very useful, click-to-call functionality is optional. If you do not wish to enable click-to-call in your Dynamics 365 environment, you can skip this step.

The following provides an example of how to enable click-to-call for the Contact form, which is associated with contact objects.

1. In Dynamics 365, go to *Settings (gear icon) > Advanced Settings* and a new window will pop.



Settings > Advanced Settings

2. Go to *Settings > Customizations* and the Customizations menu will open.



Settings > Customizations

3. Select **Customize the System**.



Click "Customize the System"

- 4. From here, the Power Apps service will launch.



Power Apps service

- 5. In the *Solution: Default Solution* panel, go to *Components > Entities > Contact > Forms*.



Go to "Components > Entities > Contact > Forms"

6. Select a form (in this example, "Contact" form) from the list of active form types; the form will pop in a new window.
7. On this form, you will see the fields layout including all the types of phone fields. You will need to modify every phone field. To do this:
 1. **Double-click** on each phone field
 2. Go to *Controls tab > Add Control > Channel Communication Control*



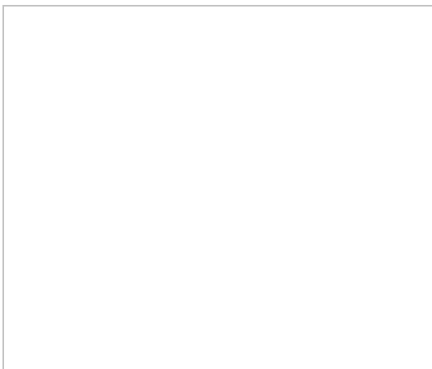
Select "Channel Communication Control"

3. For every type of communication, select the corresponding radio button (i.e., web, phone, tablet).



Select communication type(s)

4. Click **OK**.
5. Click to **Save the form**.
6. Click **Publish**.



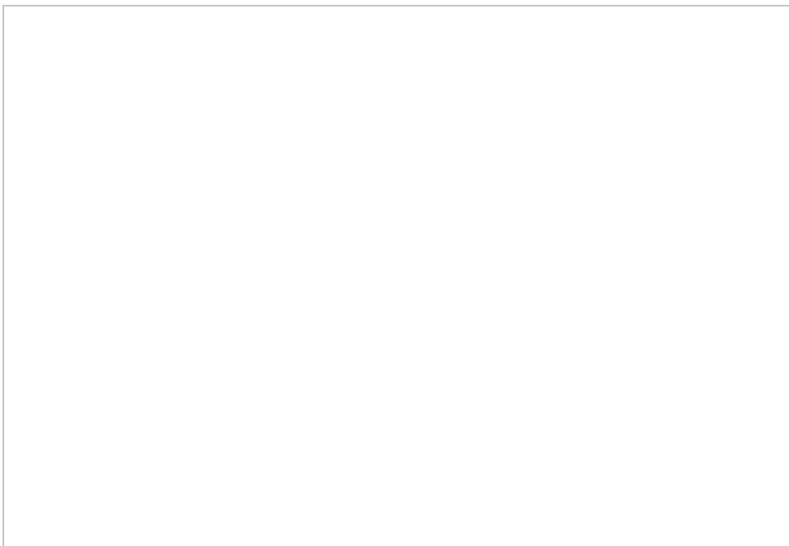
You must publish!

7. Optional: In the main Power Apps window, click **Publish all Customizations**. This step needed only if you edited multiple entities and simply saved changes rather than published them.



Optionally click "Publish all Customizations"

8. To verify the changes are made, return to the form page and refresh it. The old phone icons will be replaced with new ones. The new icons will work when you are logged into the Agent Desktop frame. **Note:** In order to see changes to your contact forms, you will need at least one contact in your Dynamics 365 environment.



Dynamics 365 contact form with click-to-call icon

5. Add Bright Pattern activity history fields to forms (optional)

It is possible to edit your Dynamics 365 forms to include Bright Pattern activity history fields. This is helpful for passing information from your Bright Pattern environment to your Dynamics 365 environment.

Although very useful, adding Bright Pattern activity history fields is optional. If you do not wish to add these fields to your Dynamics 365 forms, you can skip this step.

1. In Dynamics 365, go to *Settings (gear icon) > Advanced Settings* and a new window will pop.



Settings > Advanced Settings

2. Then, go to *Settings > Customizations* and the Customizations menu will open.



Settings > Customizations

3. Select **Customize the System**.



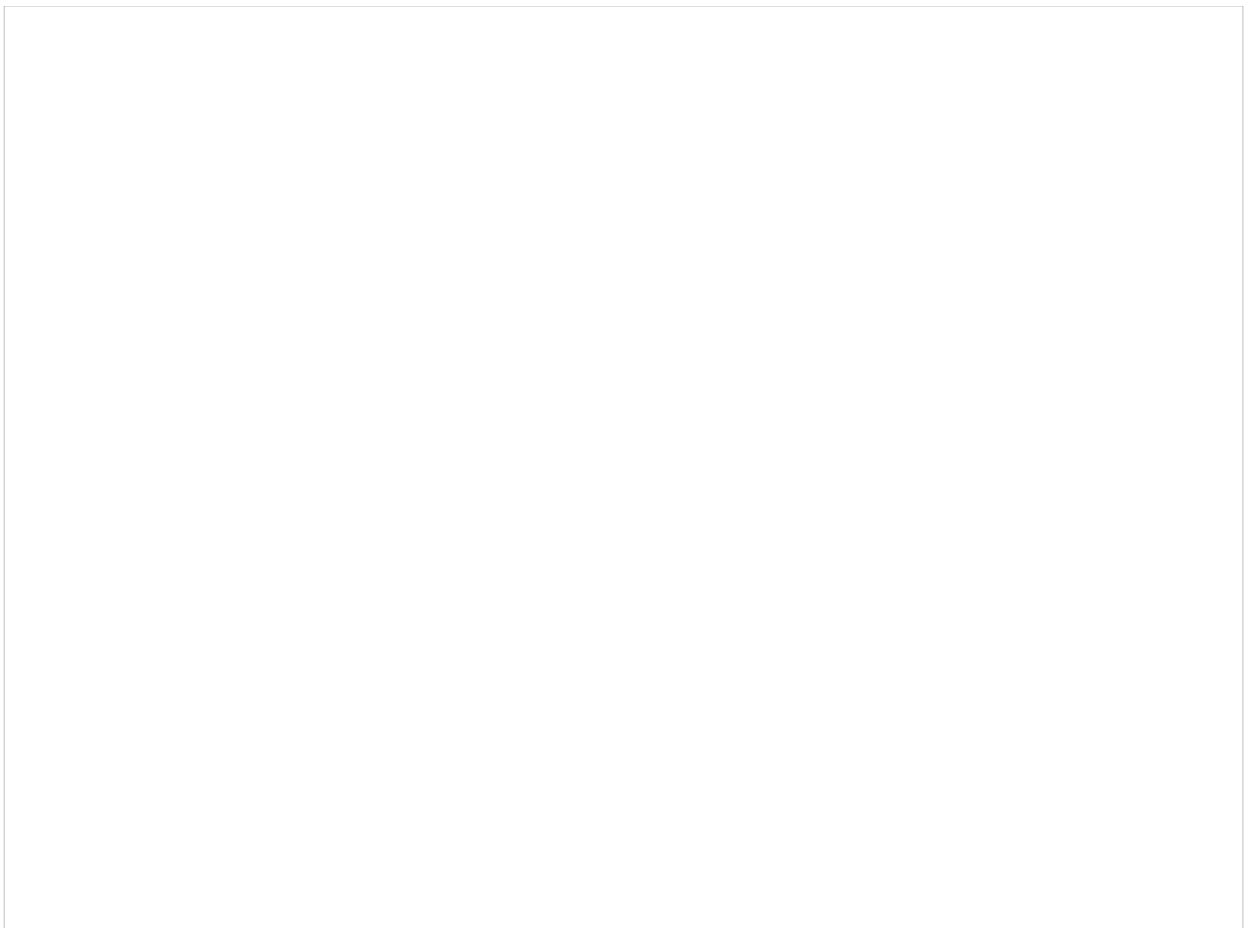
Click "Customize the System"

- 4. From here, the Power Apps service will launch.



Power Apps service

5. In the *Solution: Default Solution panel*, go to *Components > Entities*, and then:
 1. Select either the **Phone Call** object or the **Messaging Session** object (i.e., depending on whether the interaction will be for voice or chat. These objects contain Bright Pattern activity history fields)
 2. Select **Forms**
 1. Choose from the list of active forms; then a new Power Apps window will pop with the form



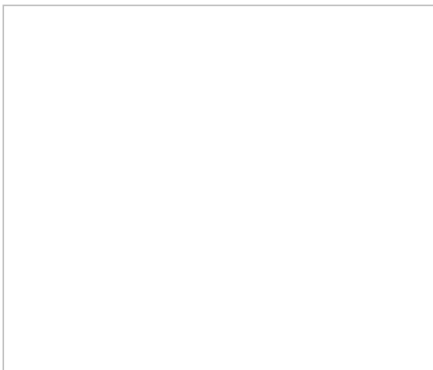
Power Apps service > form

6. In the Field Explorer panel on the right, you will see all the available activity history fields, including Bright Pattern and Microsoft activity history fields. Add as many fields as you like to your form by dragging and dropping them from the panel onto your form.
 1. To reveal the name of the field, hover your cursor over the field; the name will begin with **bpattern_**.



Hover over fields to reveal display names

7. Click **Save**, and then click **Publish**.



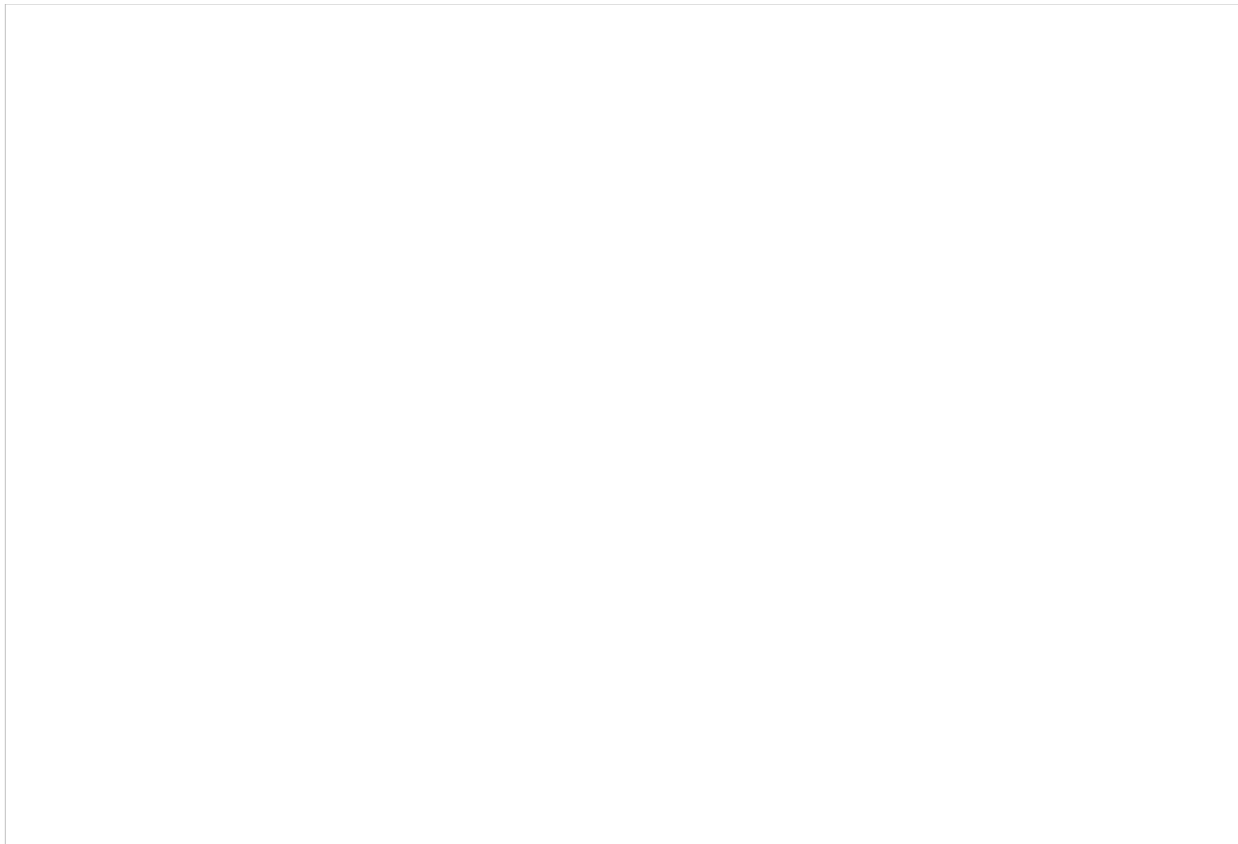
Remember to Save and Publish

8. In the main Power Apps window, click **Publish all Customizations**.



Click "Publish all Customizations"

9. To verify the Activity History fields work, you will need to process a test interaction in your Dynamics 365 environment. Once completed, you will be able to go to *My Work > Activities* and view the record containing the fields.



In "My Work > Activities", view the record containing the fields

1. [↑](#) For your Dynamics 365 environment, note that the majority of sales and customer service core functionalities have moved to the [Unified Interface](#) client; other client types will be discontinued in 2020. We recommend switching to the Unified Interface client.

Reference: How to Add an Integration Account

Connections to Microsoft Dynamics 365 apps and data are established through integration accounts.

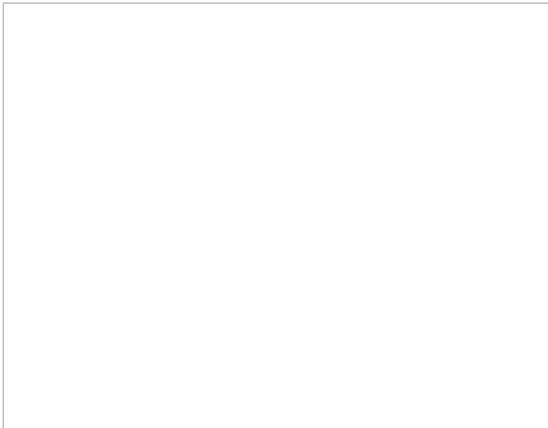
This section describes how to add your Microsoft credentials to a new Microsoft Dynamics 365 integration account in Bright Pattern's Contact Center Administrator application.

For more information, see the *Contact Center Administrator Guide*, section [Microsoft Dynamics 365 Integration](#).

Dynamics-Conf-23-54.PNG

Step 1: Add new account

1. In *Contact Center Administrator* > *Integration Accounts*, add an integration account of type **Microsoft Dynamics 365**.



Select integration account type

Step 2: Edit properties



Microsoft Dynamics 365 integration account properties

Type

By default, "Microsoft Dynamics 365" because this is the type of integration account you are creating

Name

The unique name (any) of the account

Default account

Because it is possible to have multiple integration accounts of this type, select this checkbox to enable this account as the default

Authorization URL

The OAuth 2.0 authorization endpoint (v1) of your registered app in the Azure portal

Token URL

The OAuth 2.0 token endpoint (v1) of your registered app in the Azure portal

API URL

The URL of Microsoft's Web API, including your instance name in the following format:

`https://<your-Microsoft-organization-domain>.crm.dynamics.com/api/data/v9.0`

For example:

<https://brightpatterndev.crm.dynamics.com/api/data/v9.0>

Client ID

The application (client) ID of your registered app in the Azure portal

Client Secret

The client secret (i.e., app key) of your registered app in the Azure portal

Refresh token

Authenticates your Microsoft account and allows you to consent on behalf of your organization

Test connection

Tests the connection between Bright Pattern and Microsoft

Step 3: Save!

Click **Apply** to save your changes. This completes the process of adding a Microsoft Dynamics 365 integration account.

Configuring Screen Pop for Preview Campaigns

When you have successfully integrated your Dynamics instance with your contact center, note that it is possible to pop specific [objects](#) in your instance. Popping objects is made possible by including Dynamics object IDs in a [list](#). The following tutorial will outline the steps required to make this possible.

Prerequisites

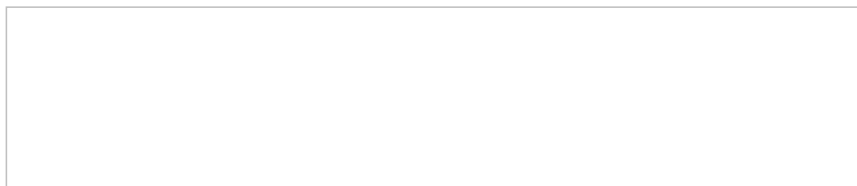
If you have not already done so, you will need to take the steps required to configure a Dynamics instance in your Bright Pattern contact center. To do this, see the following articles:

- [Prerequisites](#)
- [Configuration Section A: Enable Scenarios and Access to Dynamics 365](#)
- [Configuration Section B: Enable Agent Desktop Integration](#)
- [Reference: How to Add an Integration Account in Bright Pattern](#)

Additionally, your outbound campaign will require a configured [dial-out entry](#).

1. Create a list with a column for Dynamics object IDs

Configure a [list](#) with a column that contains the object IDs you want to pop in your Dynamics instance. These objects will pop when the corresponding preview record is sent to a logged-in agent. Note that you can pop any object [supported by Bright Pattern](#) (e.g., account, contact, invoice, order, etc.). For more information about configuring lists, see the *Contact Center Administrator Guide*, section [Lists](#).



Create a list with a column containing the desired object IDs

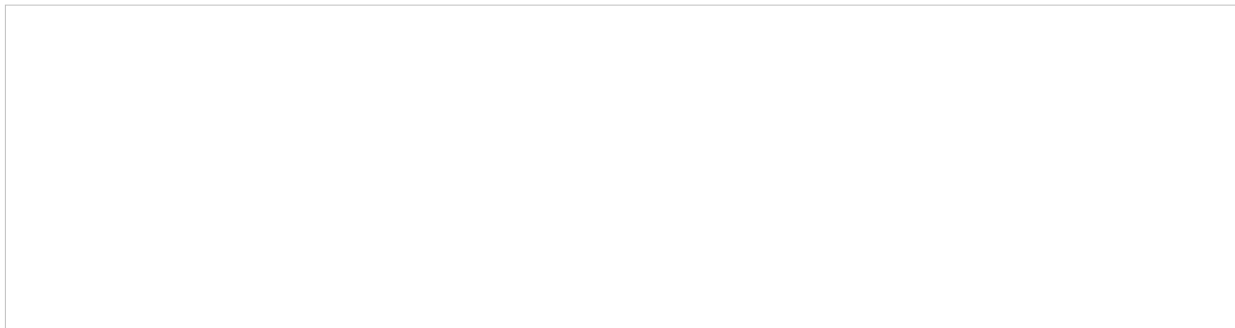
How do I locate the object ID?

Each object in your Dynamics instance has a unique identifier; object IDs are included in the object's URL. For example, if you want to find the unique ID for a **contact** object, you can find the ID at the end of the URL.



A contact ID at the end of a URL

Should you wish to access the IDs of all existing contacts, export your contacts to an Excel document. Open the document, then **Unhide** columns A through C; the unique IDs will be in column A.



Locating many IDs may be accomplished through exporting Dynamics data

2. Configure an outbound Preview campaign

Next, you will create an [outbound voice](#) service and configure a [Preview](#) campaign.

When configuring your outbound Preview campaign, make sure to do the following:

- Add teams in [Assignments](#)
- Attach the uploaded list with the Dynamics object IDs in [Lists](#) and [enable](#) it
- Add a number in [Numbers](#)
- In *Outbound > General*, select type [Preview](#) and make [Enabled](#)
- In *Outbound > Calling Hours*, configure [calling hours](#) and [Phones to call, by preference](#)
- In *Outbound > DNC*, configure your [Do Not Call lists](#)

If you have issues configuring your campaign, make sure to resolve any configuration checks listed in [Outbound > Diagnostics](#).



cent

2a. Configure the Screenpop URL

In *Outbound > General*, configure the [Screenpop URL](#) using the following format:

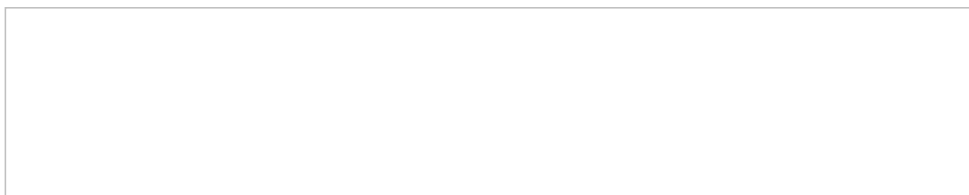
```
SHOW_OBJECT:$(workitem.otherInfo.XXX):object
```

Note that *SHOW_OBJECT* must be included. The variable [\\$\(workitem.otherInfo\)](#) must append the name of the column that contains the Dynamics object IDs (i.e., *.XXX*) to the end of the variable. The *object* is the type of object that is being popped (e.g., account, case, lead, etc.).

For example, if you want to pop a **contact** object, your Screenpop URL will look like this:

```
SHOW_OBJECT:$(workitem.otherInfo.dyn_id):contact
```

In our example, the list column containing the Dynamics contact object IDs is named *dyn_id*, and *contact* is the object type.



Configure the Screenpop URL

3. Start the campaign

In *Outbound > General*, [start the campaign](#). When your agents are logged into the Agent Desktop widget in your Dynamics instance, when a contact record is sent to them, the corresponding object in Dynamics should pop as well.



A popped contact object in a Dynamics instance

Troubleshooting

If you are having trouble getting your objects to pop, you can hardcode an object ID in place of the variable in the Screenpop URL. Hardcoding the object ID allows you to ensure the feature is functioning properly. For example, if you want to test pop a **contact** object, enter the unique contact ID in the following way:

```
SHOW_OBJECT:00aa0000-a0a0-a000-a00a-000a0a000a00:contact
```

Enable Single Sign-On

Microsoft Azure Active Directory (AD) single sign-on (SSO) enables users to sign in just one time to applications in the Microsoft Azure AD in order to access integrated applications.

With Azure AD SSO, users can sign in with one account to launch applications from the Office 365 portal, Dynamics 365, or the Azure AD MyApps access panel. Moreover, administrators can control user account management, and automatically add or remove user access to applications based on group membership. Without SSO, users have to remember passwords and sign in to each application separately.

For configuration steps, see *Tutorials for Admins*, section [Microsoft Azure Active Directory SSO Configuration](#).