

Genesys Dynamics 365 Connector

Setup Guide

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Document Overview

This document describes the steps for setting up the Dynamics 365 connector in Dynamics 365 single session (CIF 1.0) and multi session (CIF 2.0) apps.

1. Introduction

The Dynamics 365 connector enables the integration of Genesys Cloud with Dynamics 365 apps. The connector brings the Genesys Cloud functionalities inside Dynamics 365 apps. The Use Case includes the following:

- Genesys Cloud Widget in Dynamics 365 apps
- Click to Dial
- Contact Search & Screenpop
- Automated Activity Creation
- Automated Case Creation

2. Intended Audience

This document is developed for the information technology professionals whose role includes the administration and configuration of the below applications and its operations.

- Dynamics 365 Single Session and Multi Session Apps
- Genesys Cloud

3. Dynamics 365 - Setup

3.1. Channel Provider Configuration for Dynamics 365 Single Session Apps (CIF 1.0)

- Single session Dynamics 365 model driven apps are,
 - Dynamics 365 Customer Service
 - Dynamics 365 Sales
 - Dynamics 365 Project Service and
 - Dynamics 365 Field Service
- To integrate the connector in the any of the above single session apps, select Channel Integration Framework App from the list of apps in Dynamics 365 org. If it is not available, it can be downloaded from Microsoft AppSource (<https://appsource.microsoft.com/en-us/product/dynamics-365/mscrm.d365cifframework>).
For more details, <https://learn.microsoft.com/en-us/dynamics365/customer-service/channel-integration-framework/get-channel-integration-framework>.
- Go to Channel Integration Framework app.
- Click new to create a channel provider. (Detailed steps: <https://learn.microsoft.com/en-us/dynamics365/customer-service/channel-integration-framework/configure-channel-provider-channel-integration-framework>)
- Fill the below details [1].

Field	Value
Name	Genesys Dynamics Connector

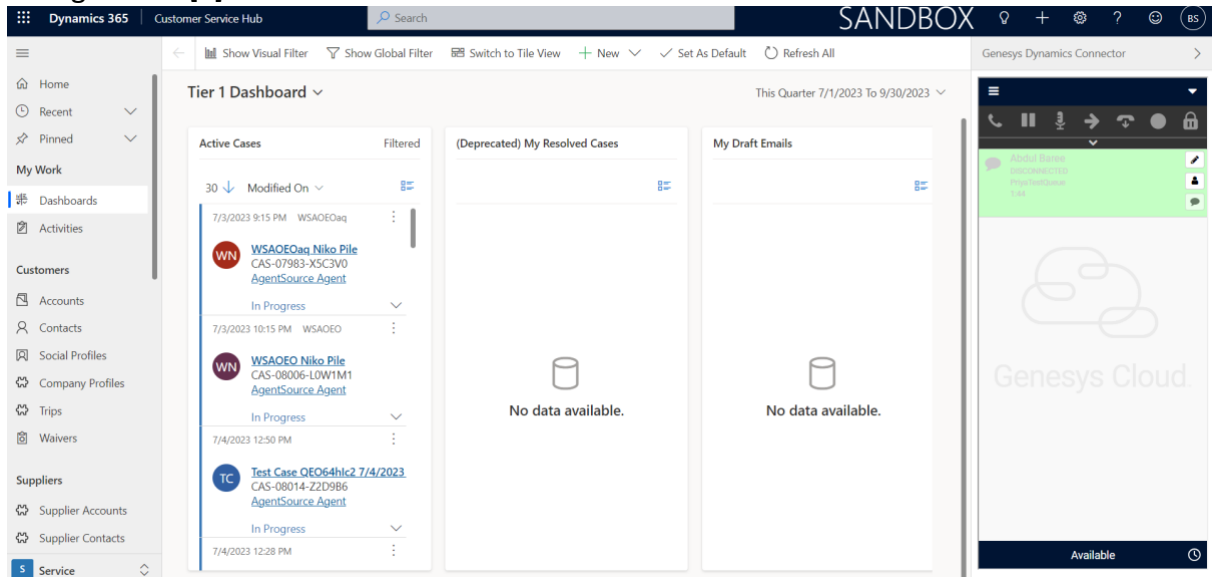
Label	Genesys Dynamics Connector
Channel URL	https://dynamicsconnector.genesysinnoapps.com
Enable Outbound Communication	Yes
Channel Order	1
API Version	1.0
Trusted Domain	https://dynamicsconnector.genesysinnoapps.com
Custom Parameters	Refer Section 3.3 for custom parameters list. Parameters need to be separated by '&'. Ex: enableActivityCreation=false&enableCaseCreation=true

- By default, connector uses 'mypurecloud.com' GC org. To login to different org, Configure the channel URL as
https://dynamicsconnector.genesysinnoapps.com?pcEnv=<GC_ORG>
Ex: <https://dynamicsconnector.genesysinnoapps.com?pcEnv=usw2.pure.cloud>
- Select the apps for the connector to be visible. [2]
- Select the user roles for the connector to be visible. [3]

The screenshot shows the Dynamics 365 Channel Integration Framework v1.0 Provider configuration page. The page is titled "New Channel Integration Framework v1.0 Provider - Unsaved" and shows the "Channel Provider Configuration" tab. The configuration is divided into three main sections: 1. Channel Provider Configuration (labeled 1), 2. Select Unified Interface Apps for the Channel (labeled 2), and 3. Select the Roles for the Channel (labeled 3). Section 1 contains fields for Name, Label, Channel URL, Enable Outbound Communication, Channel Order, API Version, Trusted Domain, and Custom Parameters. Section 2 contains a dropdown for "Customer Service Hub" and a text input "Enter text here". Section 3 contains a dropdown for "Basic User" and a text input "Enter text here".

- Click Save.
- Activate it.

- The connector will be displayed in the right side of the app selected in the configuration [2].



3.2. Channel Provider Configuration for Dynamics 365 Multi Session Apps (CIF 2.0)

- Multi session Dynamics 365 model driven apps are,
 - Omnichannel for Customer Service
 - Customer Service workspace
- To integrate the connector in any of the above multisession apps, create a Channel provider by following the steps in <https://learn.microsoft.com/en-us/dynamics365/customer-service/channel-integration-framework/v2/configure-channel-provider-app-profile-manager?tabs=customerserviceadmincenter>.
- Fill the details of Channel Provider.

Field	Value
Name	Genesys Dynamics Connector
Unique Name	gen_connector
Label	Genesys Dynamics Connector
Channel URL	https://dynamicsconnector.genesysinnoapps.com?enableCIF2=true
Enable Outbound Communication	Yes
Channel Order	1
API Version	2
Trusted Domain	https://dynamicsconnector.genesysinnoapps.com?enableCIF2=true
Custom Parameters	Refer Section 3.3 for custom parameters list. Parameters need to be separated by '&'. Ex: enableActivityCreation=false&enableCaseCreation=true

- By default, connector uses 'mypurecloud.com' GC org. To login to different org, Configure the channel URL as

https://dynamicsconnector.genesysinnoapps.com?enableCIF2=true&pcEnv=<GC_ORG>

Ex:

<https://dynamicsconnector.genesysinnoapps.com?enableCIF2=true&pcEnv=usw2.purecloud>

- Save.
- Activate it.
- Add the users [1] and channel [2] to the desired profile (Create a new profile if needed) in Agent Experience -> Workspaces -> Agent Experience Profiles.

The screenshot shows the 'Agent Experience' interface with a sidebar on the left containing navigation items like 'User management', 'Queues', 'Routing', 'Workstreams', 'Case settings', 'Overview', 'Workspaces', 'Productivity', 'Knowledge', 'Collaboration', 'Overview', 'Insights', 'Calendar', 'Service terms', 'Service scheduling', and 'Miscellaneous'. The main content area is titled 'Users' and includes a section 'Add users to this profile' with a red box labeled '1' and an 'Add users' button. Below this are 'Entity session templates' and 'Productivity pane' sections. The 'Productivity pane' section has a red box labeled '2' around the 'Channel providers' table.

Entity	Name
Case	Case entity session - default template

Productivity pane	
Productivity pane	On
Default mode	Expanded
Copilot (preview)	Off
Knowledge search	On
Microsoft Teams	Off
Agent scripts	On
Smart assist	On

Channel providers	
All active channels	On
Third party voice channel providers	---

- Create an Application Tab Template in **Agent Experience -> Workspaces -> Application Tab templates**.

Application Tab Template - 1:

Page type: 'Third Party Website'

URL: https://apps.<GC_ENV>/crm/genesysDynamics/interaction.html

Ex: <https://apps.mypurecloud.com/crm/genesysDynamics/interaction.html>

Genesys IXN Window - Saved
Application Tab Template

General Related ▾

Name	* Genesys IXN Window
Unique Name	* gen_widget
Title	Widget
Page Type	* Third Party Website
Description	---
Can close	Yes

Parameters + New Template Parame... ⋮

Name * ↑ ▾	Value ▾
data	
url	https://apps.mypurecloud.com/ci

Rows: 1 - 2 of 2

- Create 2 Session Templates in **Agent Experience -> Workspaces -> Session templates**.

Session Template 1: Genesys Home

Dynamics 365 Customer Service admin center

Genesys Home - Saved
Session Template

General Agent scripts Related ▾

Name	* Genesys Home
Unique Name	* genesys_home_session
Type	* Generic
Title	Genesys Home
Communication panel mode	* Docked
Session Icon	---
Description	---
Owner	* BagamPriyal Santhanam (A)

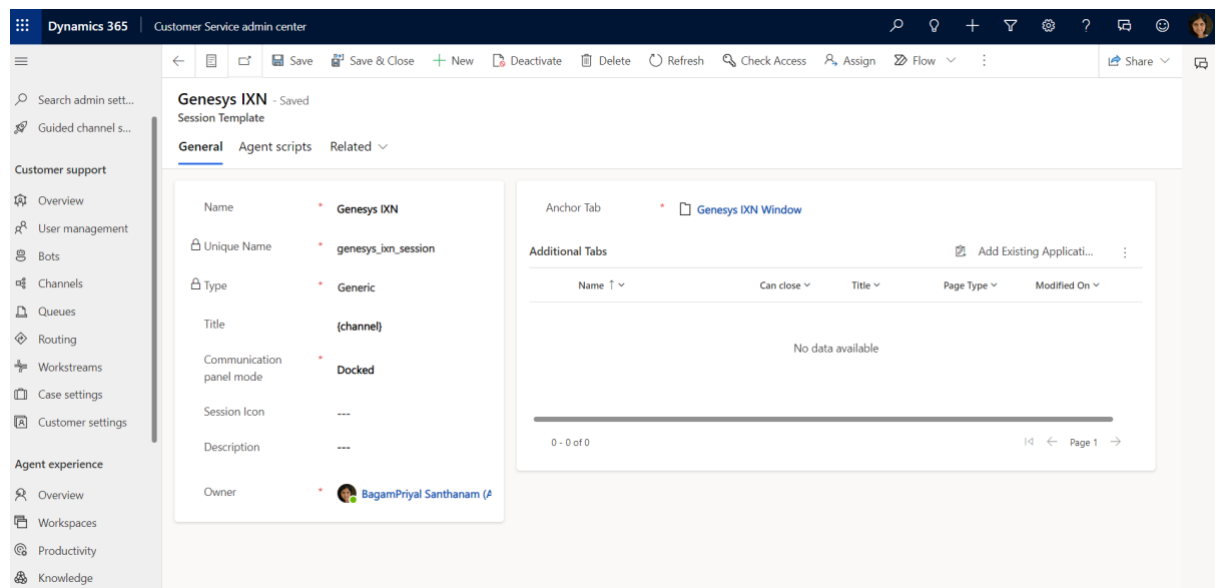
Anchor Tab * Genesys IXN Window

Additional Tabs Add Existing Applicati... ⋮

Name ↑ ▾	Can close ▾	Title ▾	Page Type ▾	Modified On ▾
No data available				

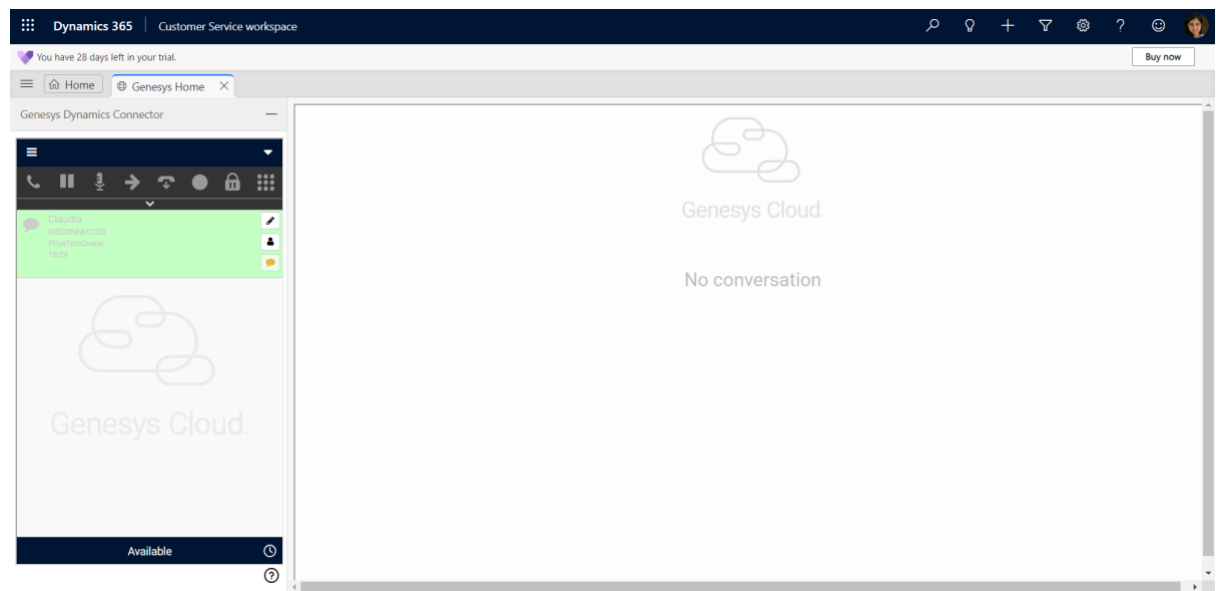
0 - 0 of 0

Session Template 2: Genesys IXN



Note: No changes should be done to the attribute values.

- Save and activate all the templates.
- Load the multisession app (Ex: Customer Service Workspace).
- The connector will be visible in the left side of the app for the users added in the profile.



3.3. Custom Parameters

#	Field	Description	Value
1	enableActivityCreation	An activity is created automatically on answer of each incoming/outgoing interaction if this option is enabled	true/false Default: true
2	enableCaseCreation	A case is created automatically on answer of each incoming/outgoing interaction if this option is enabled	true/false Default: false
3	noScreenpopOnOutbound	Only outbound call is initiated in Genesys cloud, no search/Screenpop is done in dynamics. If value set to createRecord, it will silently create record without screenpop	true/false/createRecord Default: False
4	customSearchEnabled	To search on a custom field of dynamics contact entity matching the value comes in interaction participant data. Note: This feature is only available for voice channel.	This feature is available only for voice channel. <u>Allowed values:</u> voice
5	voiceSearchFieldDyn	Custom field name in dynamics contact entity	Mandatory if customSearchEnabled is true.
6	voiceSearchFieldGen	IXN Participant data key to be used for custom search	Mandatory if customSearchEnabled is true.
7	createContactOnNoMatch	New contact is created using the	true/false

		data available in the interaction on answer of each incoming/outgoing interaction, when no match found.	Default: false
8	createOrphanActivityOnNoMatch	An activity without contact mapping is created when no match is found.	true/false Default: false This option functions exclusively when auto activity creation is enabled, not case creation.
9	orgname	Name of the Genesys Cloud organization that uses the single sign-on identity provider.	If you specify orgName, you must also specify provider.
10	provider	Name of the single sign-on provider that you want to use.	Valid values: "okta", "adfs", "salesforce", "onelogin", "gsuite", or "ping".
11	enablePopupLogin	If this option is set to true, it opens a separate window for login.	true/false Default: false if SSO related options are set, this option is set to true by default.
12	activityMap	- Mapping data that is pre-populated in the activity on auto activity creation. - Key – Value pairs separated by comma. - This option is used to map the value from genesys participant data to field in	Format: DynActivityFieldName1:ParticipantKey1, DynActivityFieldName2:ParticipantKey2... Ex: prioritycode:custom_field_1, subject:custom_field_2 Where <i>prioritycode</i> is the field in activity form and <i>custom_field_1</i> is the participant data key that brings the value from Genesys IVR flow.

		the activity form.	
13	caseMap	- Mapping data that is pre-populated in the case on auto case creation. - Key – Value pairs separated by comma. - This option is used to map the value from genesys participant data to field in the case form.	Format: DynCaseFieldName1:ParticipantKey1, DynCaseFieldName2:ParticipantKey2... Ex: prioritycode:custom_field_1, title:custom_field_2 Where <i>prioritycode</i> is the field in case form and <i>custom_field_1</i> is the participant data key that brings the value from Genesys IVR flow.
14	callDisplayList	Values set in this will be displayed on green section in widget when call interaction comes in.	Valid values: call.Ani, call.CalledNumber, call.ConversationId, call.RemoteName, call.QueueName, call.State, call.UUIData, framework.DisplayAddress
14	callbackDisplayList	Values set in this will be displayed on green section in widget when callback interaction arrives	Valid values: call.Ani, call.CalledNumber, call.UUIData, framework.DisplayAddress
15	chatDisplayList	Values set in this will be displayed on green section in widget when Chat interaction comes in.	Valid values: call.ConversationId, call.QueueName
16	emailDisplayList	Values set in this will be displayed on green section	Valid values : email.Subject,

		in widget when email interaction comes in.	
17	messageDisplayList	Values set in this will be displayed on green section in widget when message interaction comes in.	Valid values: message.Type, message.Username, message.UserId
18	activityIxnMap	- Mapping data that is pre-populated in the activity on auto activity creation. - Key : Value pairs separated by comma. This option is used to map the value from genesys interaction meta data and participant data to field in the activity form.	Format: DynActivityFieldName1:participant.<custom field 1>, DynActivityFieldName2: <interactionMetaData>, DynActivityFieldName3:'active', DynActivityFieldName4: '/account@[<interactionMetaData>]' ... Example: call.mobilephone:participant.mobile, chat.subject:name, email.prioritycode: '0', call.regardingObject: '/account@[relatedTo]' ... Explanation: In the above example, mobilephone,subject,prioritycode and regardingObject are column names in dynamics entities(tables). participant.mobile – It always starts with 'participant.'. The value of mobile is set from participant data in architect flow. name – It is the name of person from interaction Metadata. '0' – This is hardcode value 0 which is assigned to prioritycode. Note: you can assign any hardcoded values within singlequotes. Please don't use the following special characters , : = &

			• <code>'/account@[relatedTo]'</code> – This integrated the value from <code>relatedTo</code> with hardcodes value within singlequotes. Let say if <code>relatedTo</code> value is <code>'23414'</code> then the final value will be <code>/acccount23414</code> • <code>call.mobilephone</code> – represents the mobilephone column which will be mapped only for voice interactions, Since it is started with prefix <code>'call.'</code> • <code>chat.subject</code> – represents the subject column which will be mapped only for chat interactions, Since it is started with prefix <code>'chat.'</code> • <code>email.prioritycode</code> – represents the prioritycode column which will be mapped only for chat interactions, Since it is started with prefix <code>'email.'</code> • If there is no prefix mentioned, then configuration will be applied for all the interactions
19	caseIxnMap	▪ Mapping data that is pre-populated in the case on auto case creation. ▪ Key : Value pairs separated by comma. ▪ This option is used to map the value from genesys interaction meta data and participant data to field in the case form.	Format: DynActivityFieldName1:participant.<custom field 1>, DynActivityFieldName2: <interactionMetaData>, DynActivityFieldName3:'active', DynActivityFieldName4:'/account@(<interactionMetaData>]' ... Example: mobilephone:participant.mobile, subject:name, prioritycode: '0', regardingObject: '/account@[relatedTo]' ... Explanation: In the above example, mobilephone,subject,prioritycode and

			regardingObject are column names in dynamics entities(tables). • participant.mobile – It always starts with 'participant.'.The value of mobile is set from participant data in architect flow. • name – It is the name of person from interaction Metadata. • '0' – This is hardcode value 0 which is assigned to prioritycode. <u>Note:</u> you can assign any hardcoded values within singlequotes. Please don't use the following special characters , : = & • '/account@[relatedTo]' – This integrated the value from relatedTo with hardcodes value within singlequotes. Let say if relatedTo value is '23414' then the final value will be /acccount23414 • call.mobilephone – represents the mobilephone column which will be mapped only for voice interactions, Since it is started with prefix 'call.' • chat.subject – represents the subject column which will be mapped only for chat interactions, Since it is started with prefix 'chat.' • email.prioritycode – represents the prioritycode column which will be mapped only for chat interactions, Since it is started with prefix 'email.' • If there is no prefix mentioned, then configuration will be applied for all the interactions
20	createEntityOnNoMatch	New Entity is created using the data available in the interaction on answer of each	Format: true/false Default: false

		incoming/outgoing interaction, when no match found.	
21	searchEntity	Entity name(logical name) that is to be searched while connecting to each interaction	Format: <EntityType1>,<EntityType2>,<EntityType 3> Example Value: contact,account,lead Explanation: For above example, search will happen contact , if there is no match in contact, then the search will happen on account form, if there is no match in account, then the search will happen on leads. Default Entity: contact
22	createEntityMap	- Mapping data that is pre-populated in while creating entity. - Key : Value pairs separated by comma. - This option is used to map the value from genesys interaction meta data and participant data to the entity that is being created.	Format: DynEntityFieldName1:participant.<custom field 1>, DynEntityFieldName2: <interactionMetaData>, DynEntityFieldName3:'active', DynEntityFieldName4:'/account@[<interactionMetaData>]' ... Example: mobilephone:participant.mobile, subject:name, prioritycode: '0', regardingObject: '/account@[relatedTo]' ... Explanation: In the above example, mobilephone,subject,prioritycode and regardingObject are column names in dynamics entities(tables). participant.mobile – It always starts with 'participant.'. The value of mobile is set from participant data in architect flow.

			• name – It is the name of person from interaction Metadata. • '0' – This is hardcode value 0 which is assigned to prioritycode. Note: you can assign any hardcoded values within singlequotes. Please don't use the following special characters , : = & • '/account@[relatedTo]' – This integrated the value from relatedTo with hardcodes value within singlequotes. Let say if relatedTo value is '23414' then the final value will be /account23414 • call.mobilephone – represents the mobilephone column which will be mapped only for voice interactions, Since it is started with prefix 'call.' • chat.subject – represents the subject column which will be mapped only for chat interactions, Since it is started with prefix 'chat.' • email.prioritycode – represents the prioritycode column which will be mapped only for chat interactions, Since it is started with prefix 'email.' • If there is no prefix mentioned, then configuration will be applied for all the interactions
23	customRecords	▪ This option is used to represent custom records that can created when an interaction is answered. ▪ Multiple records can be listed by using comma separation.	Format: • <u><custom record1>,<custom record2></u> Example: • cr27b_transactionrecord, cr27b_interaction Explanation • cr27b_transactionrecord – represents the logical name of the form in Dynamics 365. Logical name for customer records can found in dynamics power app.

24	<custom_record1>InteractionMap In the above fieldname, please replace <custom_record1> with logical name of your actual custom record	▪ This option is used to map the value from genesys interaction meta data and participant data to the record that is being created. ▪ Mapping data that is pre-populated in the case on auto record creation. ▪ Key : Value pairs separated by comma. ▪	Format: DynEntityFieldName1: participant.<custom field 1>, DynEntityFieldName2: <interactionMetadata>, DynEntityFieldName3: 'active', DynEntityFieldName4: '/account@[interactionMetadata]' ... Example: mobilephone: participant.mobile, subject: name, prioritycode: '0', regardingObject: '/account@[relatedTo]' ... Explanation: In the above example, mobilephone, subject, prioritycode and regardingObject are column names in dynamics entities (tables). • participant.mobile – It always starts with 'participant.'. The value of mobile is set from participant data in architect flow. • name – It is the name of person from interaction Metadata. • '0' – This is hardcoded value 0 which is assigned to prioritycode. Note: you can assign any hardcoded values within single quotes. Please don't use the following special characters , : = & • '/account@[relatedTo]' – This integrated the value from relatedTo with hardcoded value within single quotes. Let say if relatedTo value is '23414' then the final value will be /account23414 • call.mobilephone – represents the mobilephone column which will be mapped only for voice interactions, Since it is started with prefix 'call.'
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			- chat.subject – represents the subject column which will be mapped only for chat interactions, Since it is started with prefix 'chat.' - email.prioritycode – represents the prioritycode column which will be mapped only for chat interactions, Since it is started with prefix 'email.' - If there is no prefix mentioned, then configuration will be applied for all the interactions
25	countryCodes	- This option is used to exclude the country codes while doing search. - Multiple country codes can be added .	<u>Format:</u> <countryCode1>,<countryCode2> <u>Example:</u> +91,+1,+61 <u>Explanations:</u> countryCodes can be added by comma separated values.
26	voicePhoneSearch	This options is used to search on multiple phonenum ber fields of dynamics.	<u>Format:</u> <dynamic_phone_field1>,<dynamic_pho ne_field2> <u>Example:</u> mobilephone,telephone1 <u>Explanation:</u> dynamic_phone_field1 – represents logical name of phone number field in dynamics.
27	disableSearch	Search can be disabled for each channels.	<u>Example:</u> email,chat,message,call <u>Explanation:</u> Ability to disable search for different channels.
28	callControls	This option allows to set call controls in the widget	<u>Example:</u> callContorls=pickup,hold,mute,transfer,di sconnect

			<u>Allowed Value:</u> pickup, hold, mute, transfer, disconnect, park, record, securePause, dtmf, scheduleCallback, flag, requestAfterCallWork
29	createOnCallback	Creates new record (activity/ case/ other forms) on call back interaction. If this is not configured, connector will popup the existing record(activity/ case/ other form) which is already part of the interaction.	<u>Example:</u> true <u>Default:</u> false
30	ctdcreaterecord	This is option is used to prevent search and screenpop newly created activity.	<u>Format:</u> ctdcreaterecord=<Dynamic_entity_name 1>, <Dynamic_entity_name2> <u>Example:</u> ctdcreaterecord=contact,account
31	enableCallerId	This option is used to set caller ID for agents.	<u>Example:</u> enableCallerId=true <u>Default:</u> false
32	openInNewTab	This option is used open newly created activity in new browser tab.	<u>Example:</u> openInNewTab=true <u>Default:</u> False <u>Note:</u> Applicable only for CIF1.0
33	enableIxnWindow	Option to load the interaction window within the connector widget	<u>Example</u> enableIxnWindow=true <u>Default</u> False
34	enablePresenceSync	Option to enable bidirectional presence sync between MS Dynamics and	<u>Example:</u> enablePresenceSync=true <u>Default</u> False

		Genesys Connector	
35	transferContext	Option to exclude/include interaction context during interaction transfers.	<u>Example:</u> transferContext=false <u>Default</u> true

- These options need to be set in “custom parameters” field of Channel Integration Framework provider configuration and it needs to be separated by &.
- Example:
enableCaseCreation=true&caseMap=prioritycode:custom_field_1,
title:custom_field_2&createContactOnNoMatch=true

Interaction meta data

This list of values which is available on each interaction that can be used for configuration is shown below

Field	Description
name	Name of the customer
ixnDirection	Direction of call such as Inbound or Outbound
queueName	Name of the queue
phone	Phone number. This can be used only for voice interactions.
ixnId	Unique ID of interaction
remoteName	Remote name of the customer
email	Represents Email ID. This can be used only for email interactions.
startTime	Start time of an interaction
participant.<custom FieldName>	Contains custom participant datas for each interaction
relatedTo	The unique identifier of contact/account/lead obtained from a search query during an interaction.

relatedType	Entity Type that is searched in an interaction
interactionUrl	Represents the url for current interaction
callDuration	Duration of an interaction
acdDuration	ACD duration of an interaction
endTime	End Time of an interaction
ixnType	Interaction type
dispositionDuration	Time agent took to complete wrap up
ivrDuration	IVR duration for an interaction

4. Custom search using participant data

An Interaction can be searched with any type of field in dynamics form/entity. This can be done by setting participant data in architect flow.

Note:

1. To search the specific dynamic field, the field should be indexed in their respective form in power apps.

2. To search on multi-match scenario, The form should be enabled in categorical search. These steps can be done through PowerApps.

3. To specify the form/ entity that is needed to be searched, please mention the form/entity name in customer parameters using the option - [searchEntity=contact,account,lead](#)

.

With this parameter, the search will follow this order:

1. **Contacts** – If no results are found, proceed to:
2. **Accounts** – If no results are found, proceed to:
3. **Leads**

Participant Data Configuration in Architect Flow

To support searching across different fields in various forms, configure the participant data as follows:

Contact Search Fields

- contact_search_genesys_1 → <ani> (You can replace <ani> with any value to search)
- contact_search_dynamics_1 → telephone1 (Logical name of the phone field in the Contact form)
- contact_search_genesys_2 → <ani> (You can replace <ani> with any value to search)
- contact_search_dynamics_2 → mobilephone (Logical name of the mobile phone field in the Contact form)

Account Search Fields

- account_search_genesys_1 → <ani> (You can replace <ani> with any value to search)
- account_search_dynamics_1 → telephone2 (Logical name of the phone field in the Account form)

Lead Search Fields

- lead_search_genesys_1 → <ani> (You can replace <ani> with any value to search)
- lead_search_dynamics_1 → telephone1 (Logical name of the phone field in the Lead form)

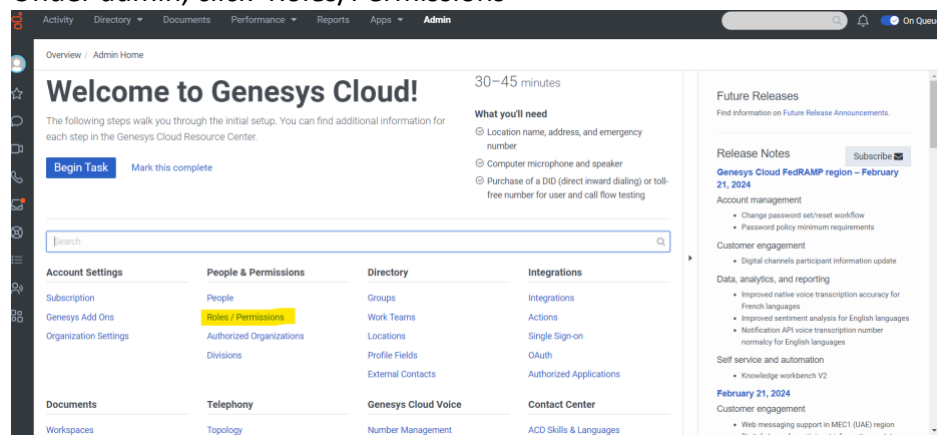
Search Flow Logic for the above participant data configuration:

1. The search will first check the Contact entity, specifically the telephone1 and mobilephone fields.
2. If no results are found in Contacts, the search moves to Accounts, checking the telephone2 field.
3. If still no results are found, the search will then check Leads, looking in the telephone1 field.

5. Setup – Genesys Cloud

5.1. Provide access to the users in Genesys Cloud Org

- Please ensure that you have purchased a subscription to Genesys Dynamics Connector.
AppFoundry Listing:
<https://appfoundry.mypurecloud.com/filter/genesyscloud/listing/1542263b-ba0f-4c14-8079-1f9b2848f278>
- If there is an active subscription to the connector in the desired GC org, the permission 'genesysDynamics' is visible under Roles/Permissions.
- Grant the permission 'genesysDynamics' to the users who need access to the connector in Dynamics App.
 - Go to Genesys Cloud Org
 - Under admin, click 'Roles/Permissions'



- You can create a new Role with the 'genesysDynamics' permission and assign to the user. Or add this permission to the existing role.

Activity

Directory

Documents

Performance

Reports

Apps

Admin

People & Permissions

Roles / Permissions

Dynamics Role

People

Roles / Permissions

Authorized Organizations

Divisions

Role Details

Permissions

Show: All Permissions Assigned Permissions

Permission	Description	License	Conditions	Unused	Division Aware
☒ Integration > genesysDynamics > All Permissions	Assigns all genesysDynamics permissions, including any future permissions	Genesys Dynamics By Professional Services for Genesys Cloud			
☐ Integration > genesysDynamics > Agent	Provides access to the Genesys Dynamics integration product	Genesys Dynamics By Professional Services for Genesys Cloud			

Page 1 of 1 25 records per page

Save

Save & Continue

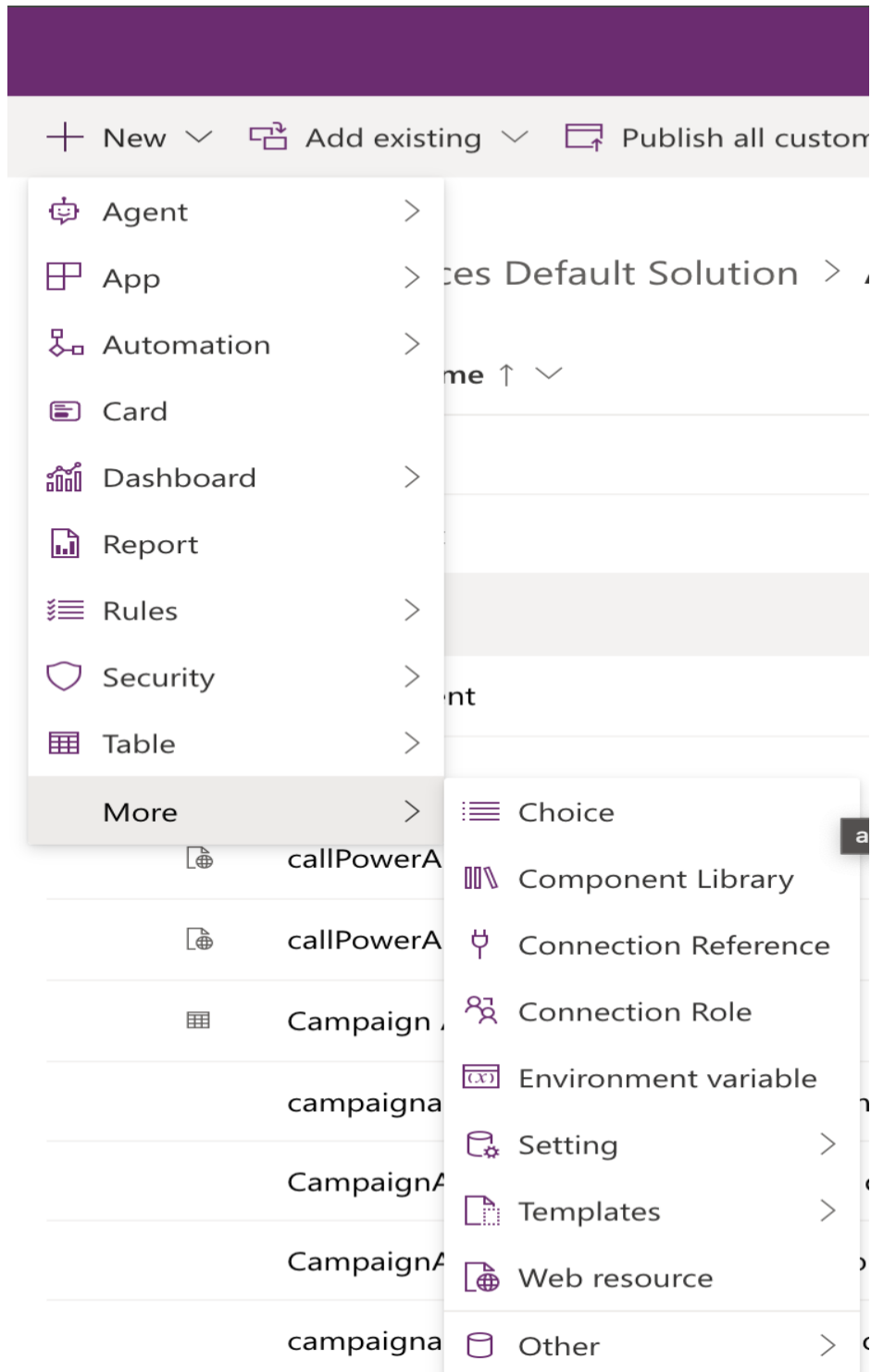
Change Membership

Cancel

Delete Role

6. Add Web Resource in Dynamics (For Click to Email and Click to SMS)

- Login to Power Apps Maker Portal (<https://make.powerapps.com/>.)
- Select your environment and navigate to Solutions.
- Open an existing solution where you want to add the web resource.
- Inside your solution, click on **New > More > Web Resource**



- By clicking on **Web resource**, a drawer on the right of the screen will open. In which you can provide JavaScript code of your web resource.

New web resource

To create your web resource, either upload a file or copy and paste code.
[Learn more](#)

Upload a file

Choose file

No file uploaded yet

Code

Copy and paste

File type *

Name *

cr416_

Display name

Description

Language

None

Save

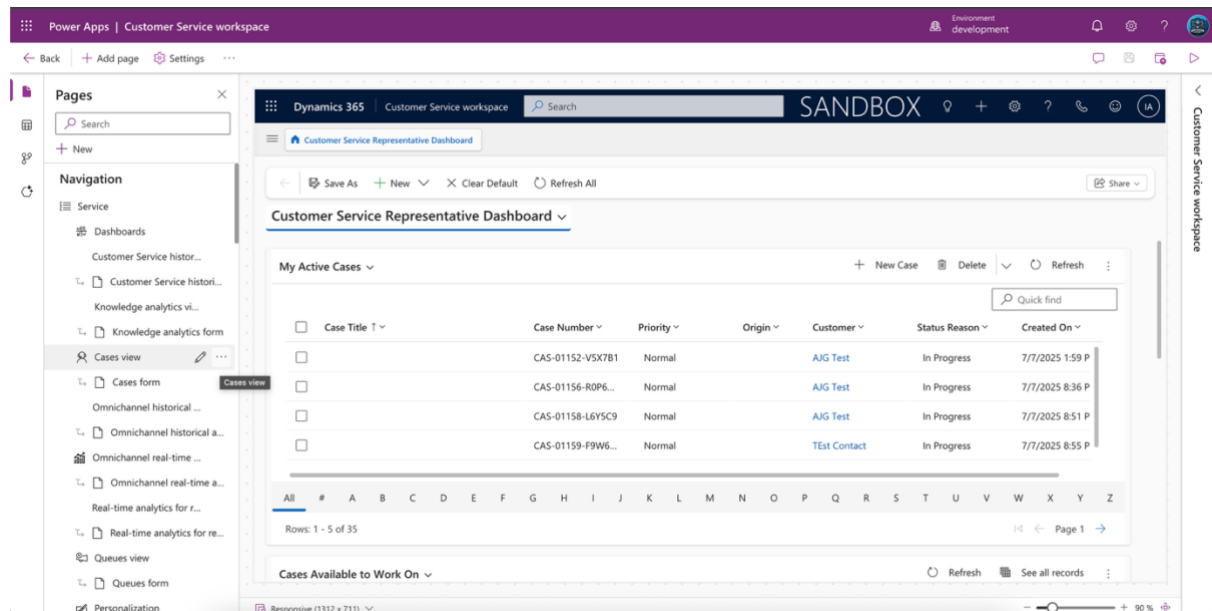
Cancel

- As seen in above image, in Code field please add the code for Click to Email or Click to SMS shared at end of this document.

- File Type should be **JavaScript (JS)**
- **Name** field should be the name of your web resource in single word (without space).
- **Display Name** for the web resource.
- **Description** should be brief explanation about web resource.
- **Language** is optional.
- Once these details are filled **Save** button will be enabled and web resource can be saved.

7. Add Command in Dynamics Form

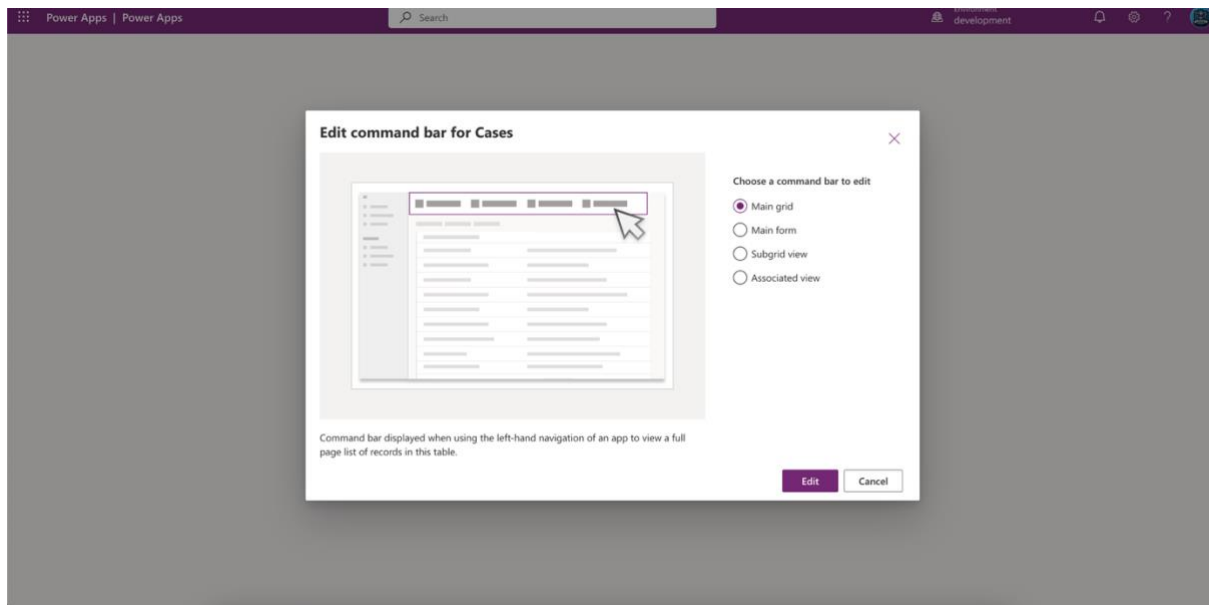
- On the Solutions page Applications like Customer Service Workspace, Sales Hub etc. are listed.
- Select preferred application. You will see below page.



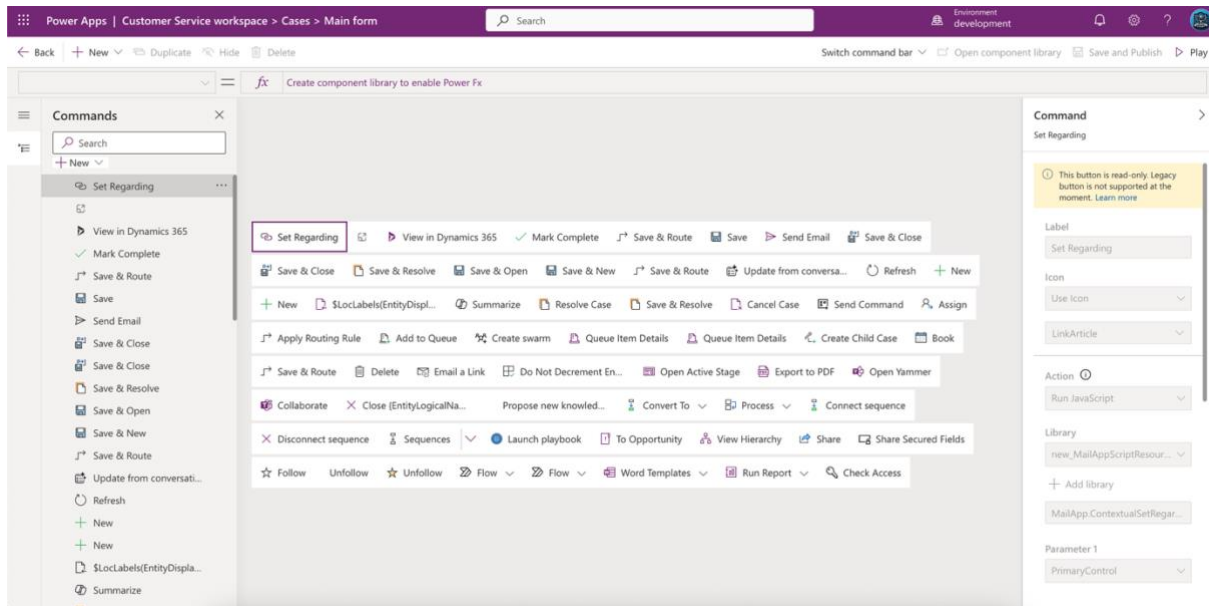
- From the Navigation Select the form on which you want to add the command. (e.g. Case View).
- When you hover over the preferred for view, there is three dots menu on the right, clicking on that menu will open a pop-up menu.



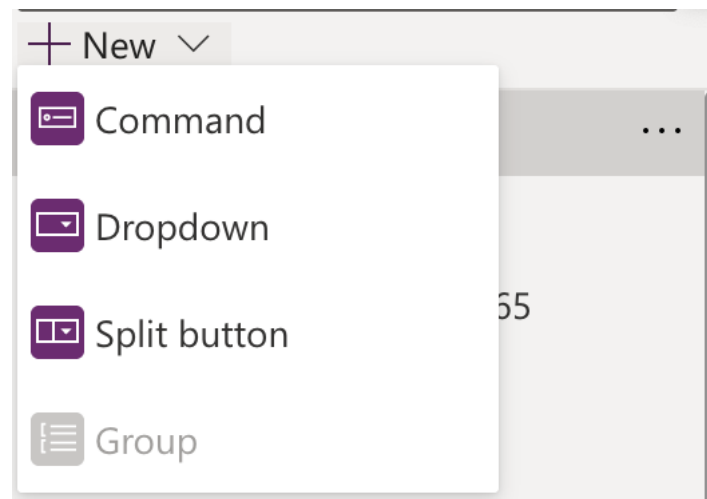
- Click on Edit Command bar.



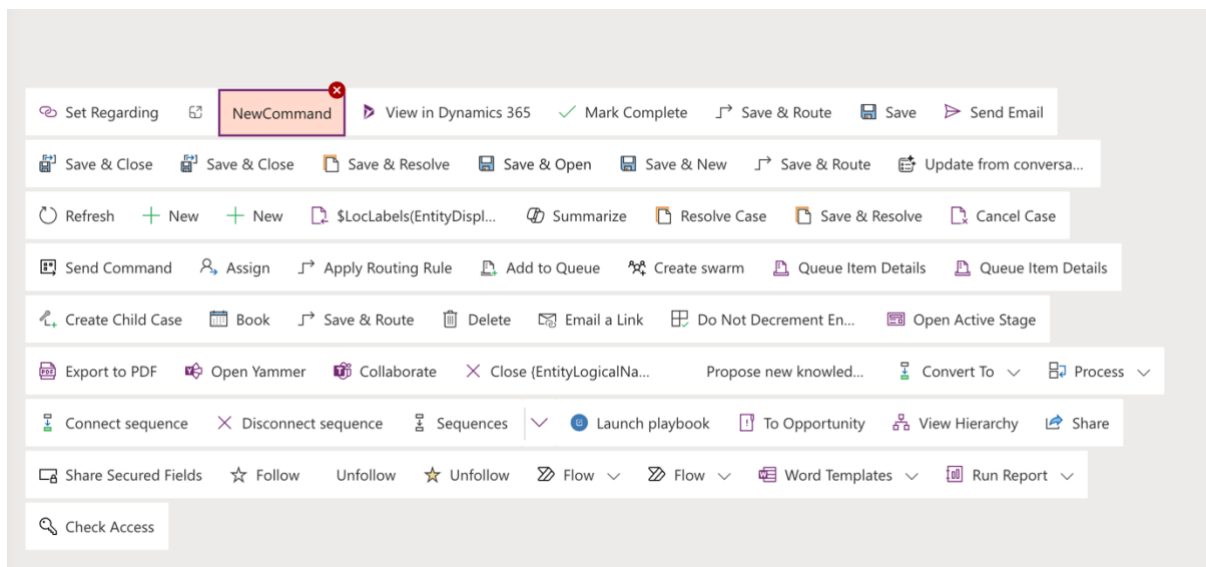
- Select Main form under Choose a command bar to edit from above image and click on Edit button.
- A new page will be shown, with all the commands currently available on the form, as shown in below image.



- Click on **New** dropdown on left navigation bar. It will open menu to add new command as shown in below image.



- Click on the command. A button with **New Command** label will be added to the list of commands.



- On the right side of the page edit command properties.

Command

NewCommand

Label

NewCommand

Icon

No Icon

Action ⓘ

Run JavaScript

Library

accessChecker_open... 

+ Add library

Function name

Function name is required

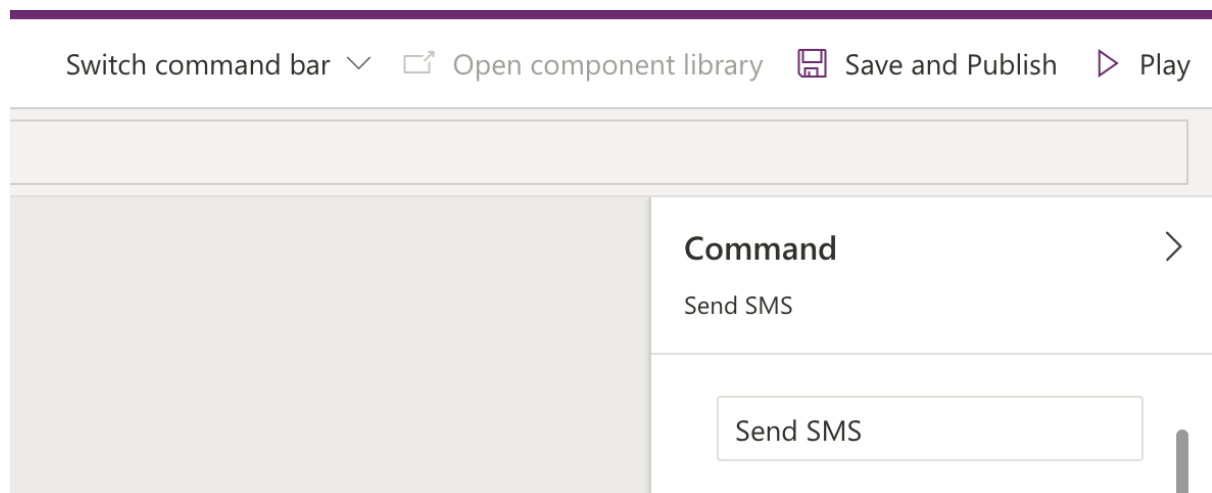
+ Add parameter

Visibility ⓘ

Show

Tooltip title

- Provide preferred Label for command (e.g. Send Email or Send SMS).
- Select preferred Icon for the command.
- Action field should be Run JavaScript.
- Select Library by clicking on the pencil icon for Library field. Here please select the web resource which was created earlier.
- Function Name should be the name of function provided in web resource. For click to email it is ClickToEmail and click to SMS it is Click To SMS.
- Provide the parameter to read from the form. For click to email provide logical name of email field and for click to SMS provide logical name of the mobile phone number field.
- Click on Save and Publish on top right corner of the screen.



- Please confirm if the changes are reflected in the Dynamics form.

8. Web Resource Code for Click To SMS

```
function ClickToSMS(smsArg) {
  console.log("GC Connector: first arg:", smsArg);
  let smsNumber = Xrm.Page.getAttribute(smsArg).getValue();
  let entityName = Xrm.Page.data.entity.getEntityName();
  let entityId = Xrm.Page.data.entity.getId().split('{')[1].split('}')[0];
  console.log("GC Connector: AppContext:", smsNumber, entityName, entityId);

  let payload = {
    phone: smsNumber,
    entityName: entityName,
    entityId: entityId,
  }

  Microsoft.CIFramework.raiseEvent("onclicktosms", payload);

  console.log("GC Connector: Fired onclicktosms event with payload", payload);
}
```

9. Web Resource Code for Click To Email

```
function ClickToEmail(emailArg) {
  console.log("GC Connector: first arg:", emailArg);
  let emailAddress = Xrm.Page.getAttribute(emailArg).getValue();
  let entityName = Xrm.Page.data.entity.getEntityName();
  let entityId = Xrm.Page.data.entity.getId().split('{')[1].split('}')[0];
  console.log("GC Connector: AppContext:", emailAddress, entityName, entityId);

  let payload = {
    email: emailAddress,
    entityName: entityName,
    entityId: entityId,
  }

  Microsoft.CIFramework.raiseEvent("onclicktoemail", payload);

  console.log("GC Connector: Fired onclicktoemail event with payload", payload);
}
```