



Cloud One BCS + Microsoft Dynamics

365

**Cloud One Business
Communication Suite**



Microsoft
Dynamics 365



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Microsoft Dynamics 365 CRM Integration Guide

Cloud One Business Communication Suite supports integration with Microsoft Dynamics 365 CRM, delivering seamless communication capabilities within the CRM interface. With an embedded Simu Connect plugin, users can make and receive phone calls through PBX, manage call activities, and streamline workflows, all without leaving Dynamics 365. This integration enhances productivity by centralizing communication and CRM operations in a single interface.

Requirements

Platform	Requirement
PBX Server	<ul style="list-style-type: none">• Firmware: Version 84.19.0.22 or later.
Microsoft 365	<ul style="list-style-type: none">• License: Your business has a subscription to one of the following Microsoft 365 licenses:<ul style="list-style-type: none">◦ Microsoft 365 Business Basic◦ Microsoft 365 Business Standard◦ Microsoft 365 Business Premium◦ Microsoft 365 Apps for Business• Service: Your business uses Microsoft Dynamics 365 Sales as the CRM system.
Browser	<p>For optimal performance, the integration is recommended to be set up and used with the following browsers:</p> <ul style="list-style-type: none">• Microsoft Edge• Google Chrome• Opera

Key features

The integration of Cloud One Business Communication Suite and Dynamics 365 CRM provides the following key features:

Embedded Simu Connect plugin

Seamlessly integrates the Simu Connect client into the Dynamics 365 interface. Users can handle all communications within their CRM, eliminating the need to switch between systems.

Click to Call

Users can launch calls by a single click on phone numbers within Dynamics 365 CRM.

Call Popup

Automatically bring up the contact's profile in the CRM when users receive / answer an inbound call from a CRM contact, or finish a call with a CRM contact. In addition, users are able to manually open the contact's profile from the call window during a call with a CRM contact.

Dynamics contact creation

A new contact with specified type can be created automatically or manually in Dynamics 365 CRM for unknown inbound calls or outbound calls.

Phone call activity logging

Call activities with related information can be logged automatically or manually to Dynamics 365 CRM when a user ends calls with CRM contacts.

Access to call recordings

Users can see and play recordings stored in the PBX from corresponding phone call activity right within the CRM system.

Integration workflow

The integration between Cloud One PBX and Microsoft Dynamics 365 involves two main phases:

Administrator setup

To integrate the PBX system with Microsoft Dynamics 365, the administrator needs to set up a communication channel in Microsoft Dynamics 365:

1. Add Cloud One Business Communication Suite as a channel provider via Channel Integration Framework (CIF), which provides an embedded plugin (referred to as the 'Simu Connect for Dynamics 365' plugin) within Dynamics 365 for users to manage calls.
2. Assign Channel Access permission to the Microsoft accounts of relevant users, ensuring that the embedded plugin is visible and accessible within their Dynamics 365 CRM interface.

For more information, see [Integrate Cloud One Business Communication Suite with Microsoft Dynamics 365 CRM](#).

User configuration and usage

After the integration is successfully configured by the administrator, users can access the 'Simu Connect for Dynamics 365' plugin within their Dynamics 365 CRM interface, and configure their personal integration settings:

1. [Log in to Simu Connect within Dynamics 365 CRM.](#)
2. Customize the CRM integration settings as needed to better fit their daily communication workflows.
 - [Configure Number Matching in Dynamics 365](#)
 - [Set up Contact Creation](#)
 - [Set up Call Popup](#)
 - [Set up Phone Call Activity Creation](#)
 - [Enable Call Recording Playback in Dynamics 365](#)
 - [Set up Auto Launch for 'Simu Connect for Dynamics 365'](#)

Administrator Setup

Integrate Cloud One Business Communication Suite with Microsoft Dynamics 365 CRM

Cloud One Business Communication Suite supports the integration with Microsoft Dynamics 365 CRM via Channel Integration Framework (CIF). This topic describes how to set up the integration to embed the PBX system into Dynamics 365 CRM as a plugin, allowing users to handle calls within the plugin area of CRM, while continuing to perform other CRM-related tasks without switching between systems.

Requirements

Platform	Requirement
PBX Server	<ul style="list-style-type: none">• Firmware: Version 84.19.0.22 or later.
Microsoft 365	<ul style="list-style-type: none">• License: Your business has a subscription to one of the following Microsoft 365 licenses:<ul style="list-style-type: none">◦ Microsoft 365 Business Basic◦ Microsoft 365 Business Standard◦ Microsoft 365 Business Premium◦ Microsoft 365 Apps for Business• Service: Your business uses Microsoft Dynamics 365 Sales as the CRM system.• Account: The Microsoft account used to set up the integration should meet the following requirements:<ul style="list-style-type: none">◦ Assigned with the Global Administrator role.◦ Assigned with a valid Microsoft 365 commercial license.
Browser	<p>For optimal performance, the integration is recommended to be set up and used with the following browsers:</p> <ul style="list-style-type: none">• Microsoft Edge• Google Chrome• Opera

Add the PBX system as a channel provider

To integrate PBX system with Microsoft Dynamics 365 CRM, you need to add it as a channel provider using the Channel Integration Framework (CIF). This allows the PBX system to

function as a plugin embedded within the Dynamics 365 CRM interface, offering seamless access and interaction.

**Note:**

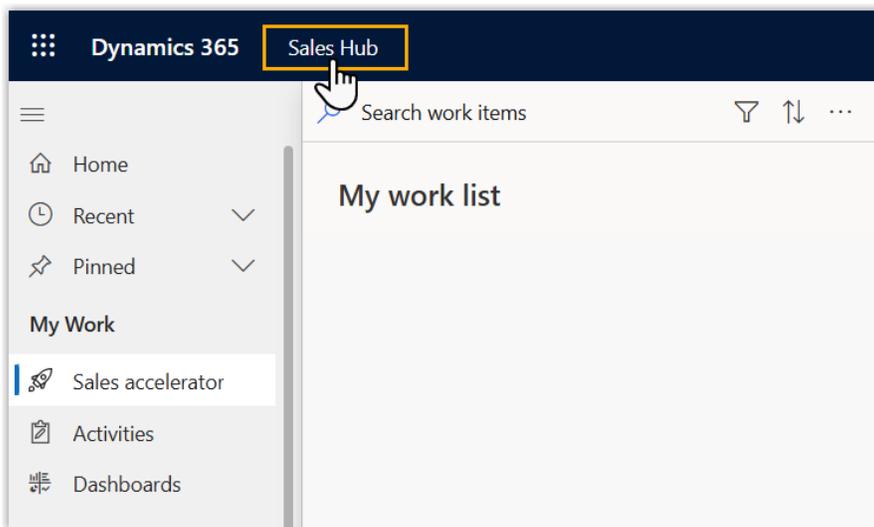
The integration will only work on CIF version 1.0.

1. Log in to Dynamics 365 instance (e.g. `https://{{your-organization}}.crm.dynamics.com`) with the administrator account.

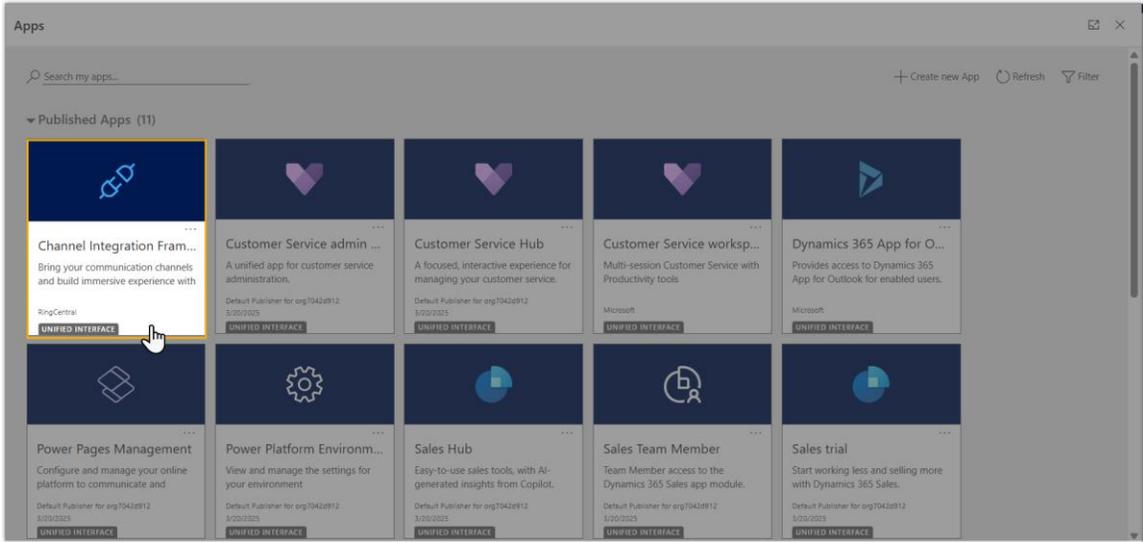
**Note:**

Replace *your-organization* with your actual domain name.

2. At the top of the page, click the current app name.

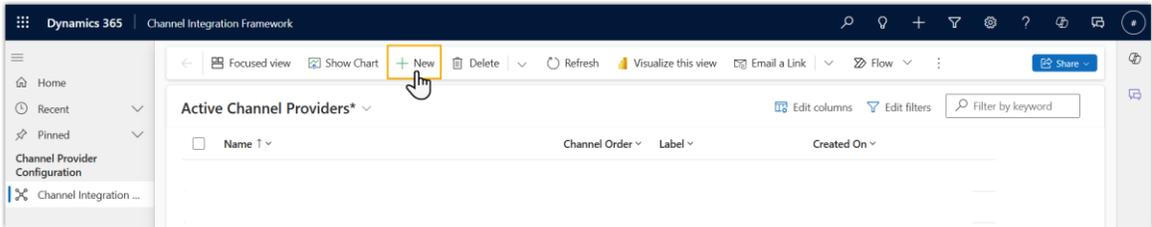


3. In the **Apps** page, search for and select **Channel Integration Framework**.

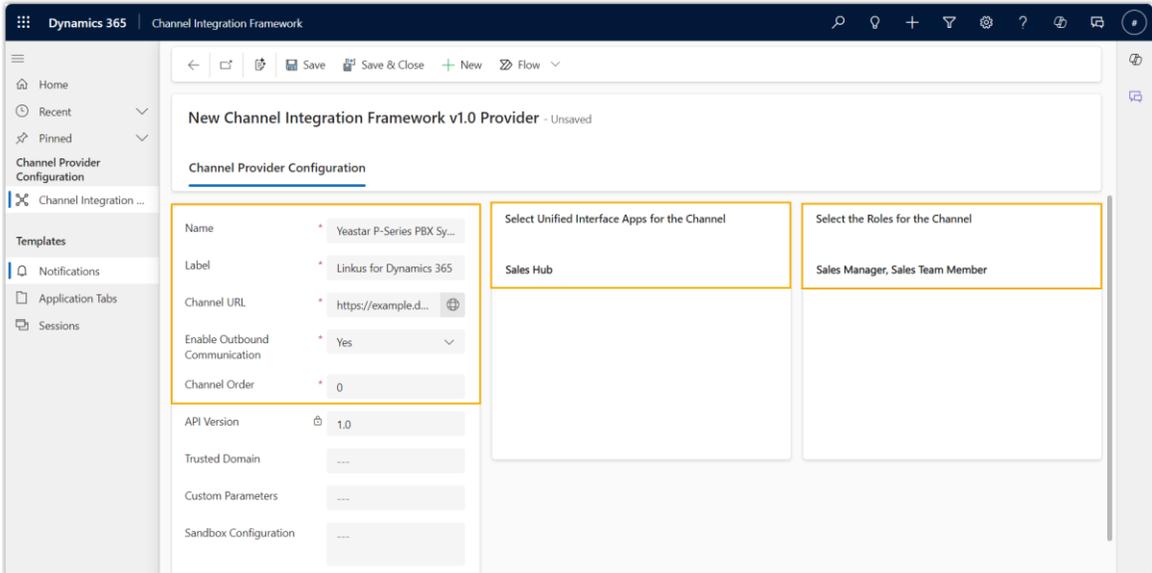


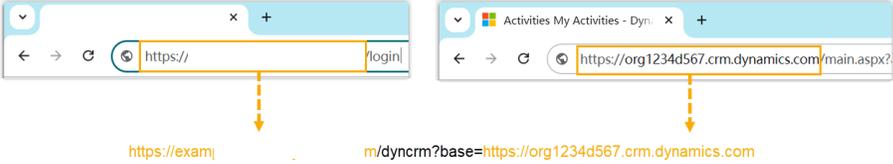
You are redirected to the **Channel Integration Framework** app.

4. At the top of the tool bar, click **New** to add a new channel provider.



5. In the **Channel Provider Configuration** tab, complete the following settings.

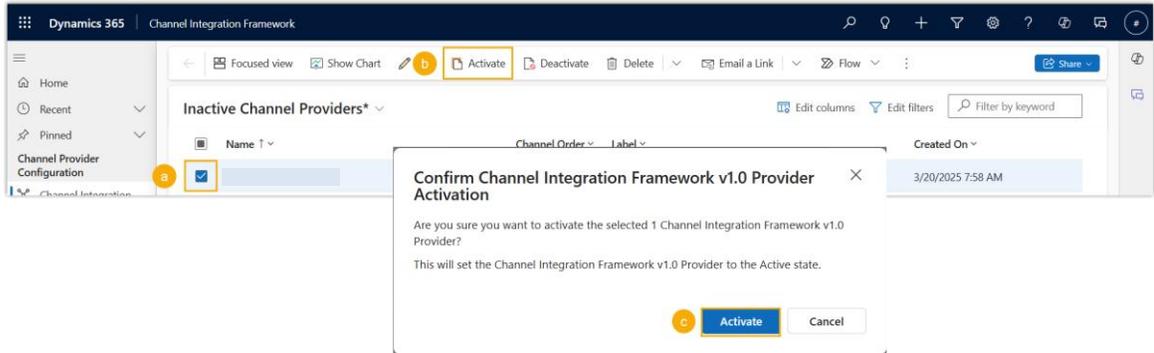


Setting	Description
Name	Specify a name to help you identify the channel. For example, <code>Cloud One Business Communication Suite PBX System</code> .
Label	Specify the label that is displayed as the name of the channel. For example, <code>Simu Connect for Dynamics 365</code> .
Channel URL	<p>Enter the URL that will connect the PBX system to Dynamics 365 in the following format:</p> <pre>https://{{PBX_domain}}/dyncrm?base={{CRM_base_url}}</pre> <ul style="list-style-type: none"> • <code>{{PBX_domain}}</code>: The domain name of the PBX system. • <code>{{CRM_base_url}}</code>: The URL of the Dynamics 365 instance. <p>For example, the PBX domain name and your Dynamics 365 instance URL are shown below:</p>  <p>Then the channel URL should be:</p> <pre>https://example.domain.cloudone.co/dyncrm?base=https://org1234d567.crm.dynamics.com</pre>
Enable Outbound Communication	Select Yes to allow users to place calls from Dynamics 365 via the communication channel.
Channel Order	Specify the order in which this channel appears in the channel list. <p> Note: Channels with lower numbers are displayed with higher priority.</p>
Select Unified Interface Apps for the Channel	Search for and select Sales Hub , which will make the channel available within the Dynamics 365 CRM interface.
Select the Roles for the Channel	Select the user role(s) that are allowed to access the channel.

6. At the top of the page, click **Save & Close**.

The channel is created and displayed in the channel providers list.

7. Activate the channel.

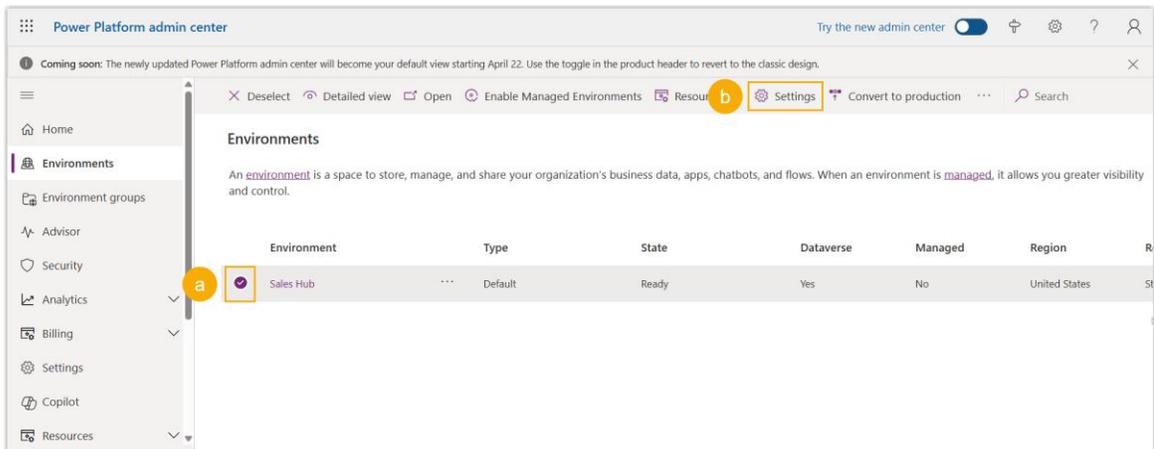


- a. In the channel providers list, select the channel.
- b. At the top of the page, click **Activate**.
- c. In the pop-up window, click **Activate**.

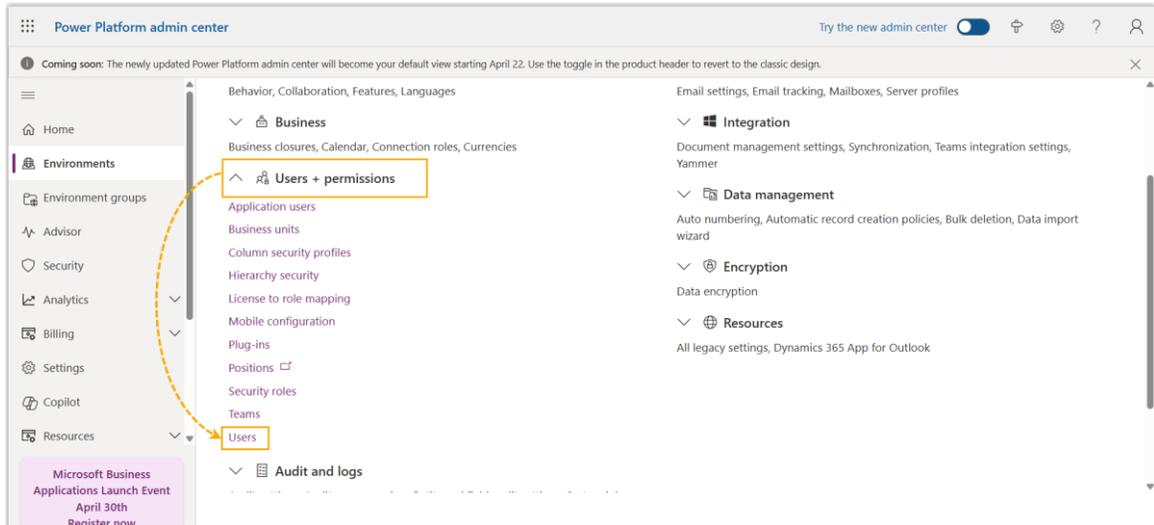
Grant users access to the channel

After adding the channel provider, you need to assign **Channel Access** security role to the specific users. This ensures that users with the appropriate roles, as specified in the channel configuration, can have access to the channel.

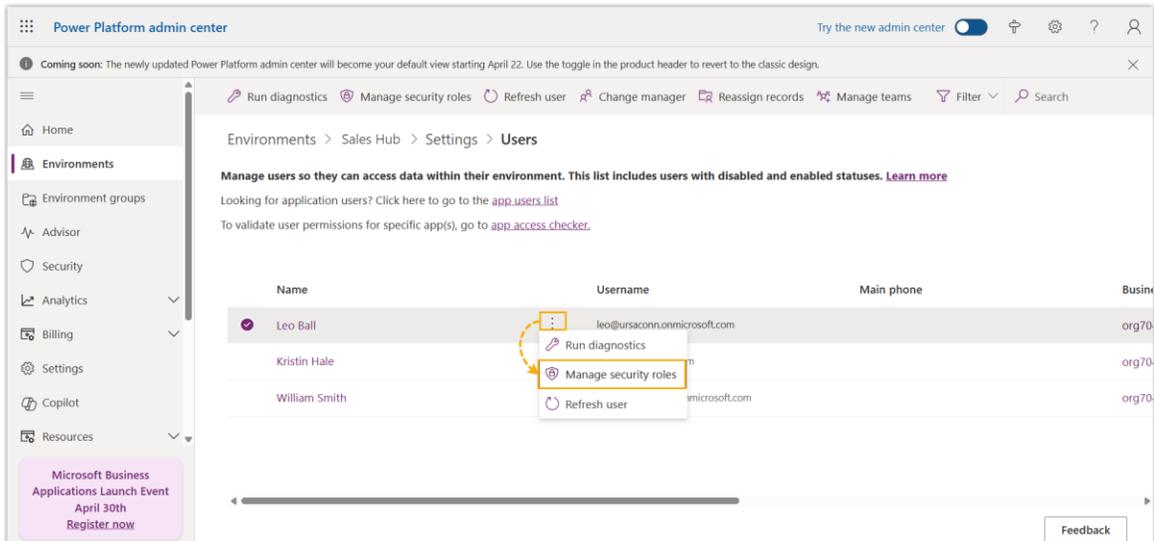
1. Log in to [Microsoft Power Platform Admin Center](#).
2. In the **Environments** page, select your sales hub, then click **Settings**.



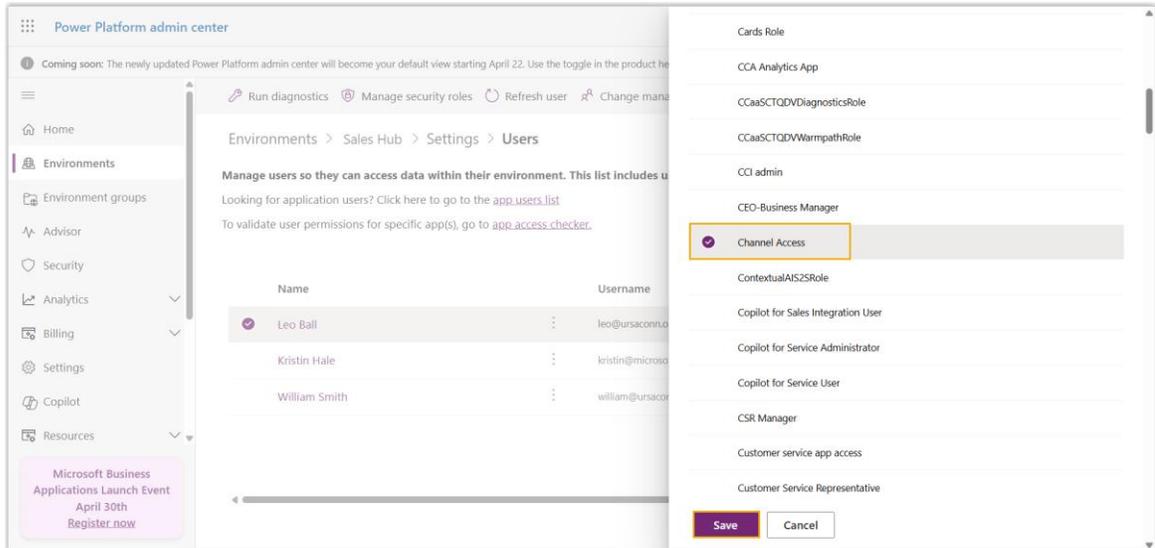
3. Click **Users + permissions**, then select **Users**.



4. Click  beside a user, then select **Manage security roles**.



5. In the right panel, select **Channel Access**, then click **Save**.



Result

- A channel has been successfully set up.
- Users with specified security roles can see an embedded plugin (referred to as the "Simu Connect for Dynamics 365" plugin) in their Sales Hub app, and they can use this plugin to handle calls directly within Dynamics 365 CRM.

What to do next

- If you want to allow users to log in to their extension account via SSO within the embedded plugin, you need to configure the SSO redirect URI in the third-party application (such as Microsoft Entra ID and Google Workspace) using the following format:

```
https://{{PBX_domain}}/dyncrm/login
```

For more information about the SSO configurations, see the following topics:

- Microsoft Entra ID (Azure Active Directory) Integration Guide
- Google Workspace Integration Guide
- Users can [log in to Simu Connect within Dynamics 365 CRM](#) and configure the Dynamics integration settings according to their needs.

User Configuration and Usage

Get Started

Log in to Simu Connect within Dynamics 365 CRM

After the administrator has completed the Dynamics 365 CRM integration, users can access and use the 'Simu Connect for Dynamics 365' plugin directly within the Dynamics 365 interface, enabling seamless access to essential PBX communication functions without switching systems. This topic describes how to access and log in to the plugin.

Prerequisites

- System administrator has completed [the integration of Cloud One Business Communication Suite and Microsoft Dynamics 365](#).
- According to the login method you will use, contact the system administrator to obtain your login credentials or confirm that your extension account is ready on the PBX.

Login Method	Prerequisites
Log in using extension credential	Obtain the username and password of your extension account from system administrator.
Log in with Google account	System Administrator has integrated the PBX with Google Workspace and complete the following settings: <ul style="list-style-type: none">◦ Synchronize your Google account to the PBX and associate with an extension.◦ Enable Single Sign-on (SSO) feature.
Log in with Microsoft account	System Administrator has integrated the PBX with Microsoft Entra ID (Azure Active Directory) and complete the following settings: <ul style="list-style-type: none">◦ Synchronize your Microsoft account to the PBX and associate with an extension.◦ Enable Single Sign-on (SSO) feature.
Log in with Active Directory account	System Administrator has integrated the PBX with Active Directory , and complete the following settings: <ul style="list-style-type: none">◦ Synchronize your Active Directory account to the PBX and associate with an extension.◦ Enable Single Sign-on (SSO) feature.

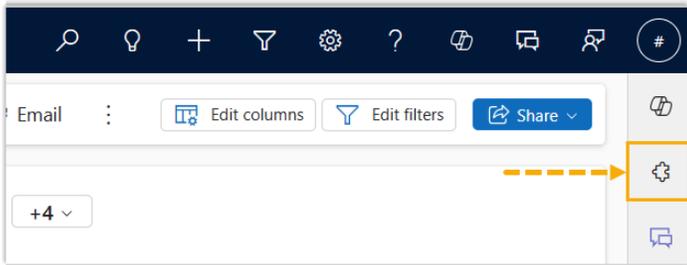
- It is recommended to use **Google Chrome, Microsoft Edge, or Opera** browser for optimal performance.

Procedure

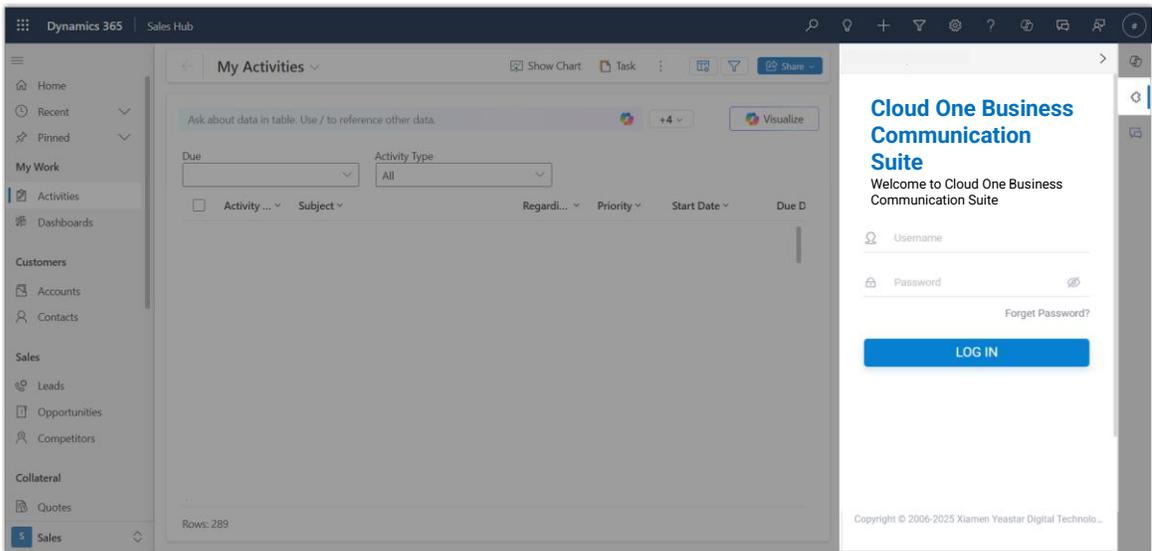
1. Log in to Dynamics 365 instance (e.g. `https://{{your-organization}}.crm.dynamics.com`).

 **Note:**
Replace *your-organization* with your actual domain name.

2. At the right side of the Dynamics 365 interface, click .



The 'Simu Connect for Dynamics 365' plugin is displayed as a fixed side pane.



3. Log in to Simu Connect via any of the following methods:

Login Method	Instruction
Log in using extension credential	a. On the login page, enter the credential of your extension account.

Login Method	Instruction
	<ul style="list-style-type: none"> • Username: The email address of the extension account. • Password: Enter the password associated with the user name. <p>b. Click LOG IN.</p> <p>c. If you have set up two-factor authentication for your account, enter the authentication code, then click LOG IN.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p> Note: For the device from which you log in most frequently, you can enable the option Trusted Devices to add it as a trusted device. In this way, you don't have to re-enter an authentication code with this device for the next 180 days.</p> </div> <div style="border: 1px solid #ccc; padding: 20px; margin: 10px 0; text-align: center;"> <h2>Two-Factor Authentication</h2> <p>Please enter authentication code. The authentication code has been sent to email: e**g@: .com .</p> <div style="display: flex; justify-content: center; gap: 10px;"> <div style="border: 1px solid #ccc; padding: 5px 10px;">3</div> <div style="border: 1px solid #ccc; padding: 5px 10px;">2</div> <div style="border: 1px solid #ccc; padding: 5px 10px;">8</div> <div style="border: 1px solid #ccc; padding: 5px 10px;">3</div> <div style="border: 1px solid #ccc; padding: 5px 10px;">3</div> <div style="border: 1px solid #ccc; padding: 5px 10px;">1</div> </div> <p>Resend available in 76s</p> <p><input checked="" type="checkbox"/> Trusted Device</p> <div style="display: flex; justify-content: center; gap: 20px; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px 15px; background-color: #f0f0f0;">Cancel</div> <div style="background-color: #0070c0; color: white; padding: 5px 15px; border-radius: 5px;">LOG IN</div> </div> </div>
Log in with Google account	<ol style="list-style-type: none"> a. On the login page, click . b. Sign in to your Google account.

Login Method	Instruction
	After signed-in, you are automatically logged in to Simu Connect.
Log in with Microsoft account	a. On Simu Connect login page, click  . b. Sign in to your Microsoft account. After signed-in, you are automatically logged in to Simu Connect.
Log in with Active Directory account	a. On Simu Connect login page, enter the following information. <ul style="list-style-type: none"> • Username: Enter the username of your AD domain account (Format: <code>username@domainname</code>). • Password: Enter the password associated with the username. b. Click LOG IN .

Result

You have successfully logged in to the plugin and can now use various PBX calling features directly within the Dynamics 365 CRM interface.

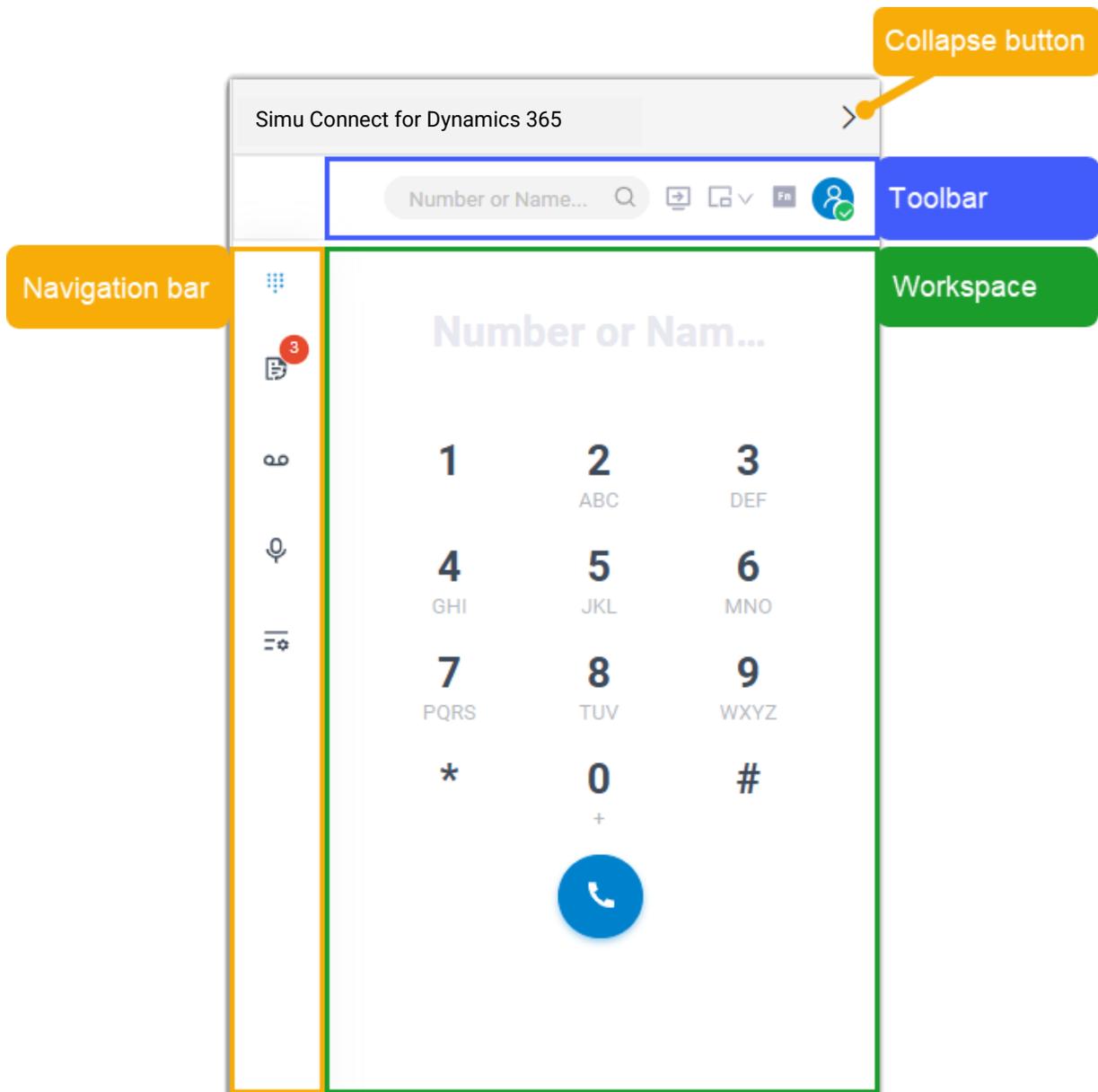
For more information about the plugin layout, see [Learn about the 'Simu Connect for Dynamics 365' Plugin](#).

Learn about the 'Simu Connect for Dynamics 365' Plugin

The 'Simu Connect for Dynamics 365' plugin provides a simplified Simu Connect interface for easy access to calling features within Dynamics 365. This topic provides an overview on the plugin inter- face and detailed descriptions of each component.

'Simu Connect for Dynamics 365' Layout

After you log in to your extension in the plugin within Dynamics 365, a mini Simu Connect client is displayed. The layout of the plugin is as shown below:



Navigation bar

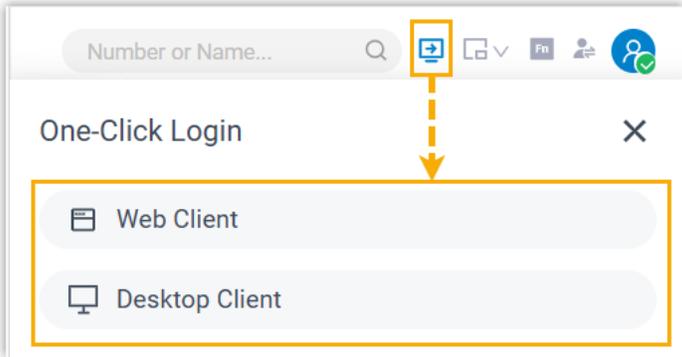
Navigation bar provides quick access to the following features:

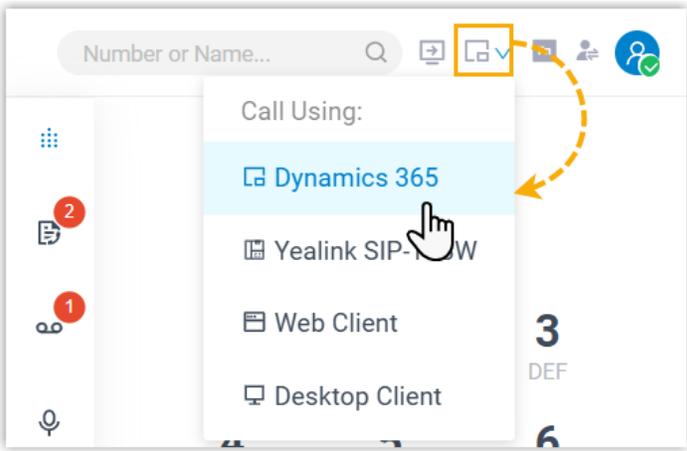
Feature	Description
Dial Pad	Dial a number to make an audio call.
Call Logs	Check and manage your call logs.
Voicemails	Check and manage your voicemails.
Recordings	Check and manage your call recording files.

Feature	Description
Settings	Configure the following settings: <ul style="list-style-type: none"> • Audio devices • Dynamics 365 CRM integration settings

Toolbar

Toolbar provides quick access to common actions:

Feature	Description
	Search PBX contacts by name or number.
	Click to log in to Simu Connect Web Client or Simu Connect Desktop Client. You can quickly access Simu Connect Web Client or open Simu Connect Desktop Client with your extension account without entering credentials. 
	Select the endpoint to make and receive calls. You can directly use Dynamics 365 as the call endpoint, or use Simu Connect Web Client , Simu Connect Desktop Client , or IP Phone as calling endpoint by enabling CTI control over these endpoints. In this way, you can control calls in Dynamics 365, while calls are made and received from the selected endpoint.

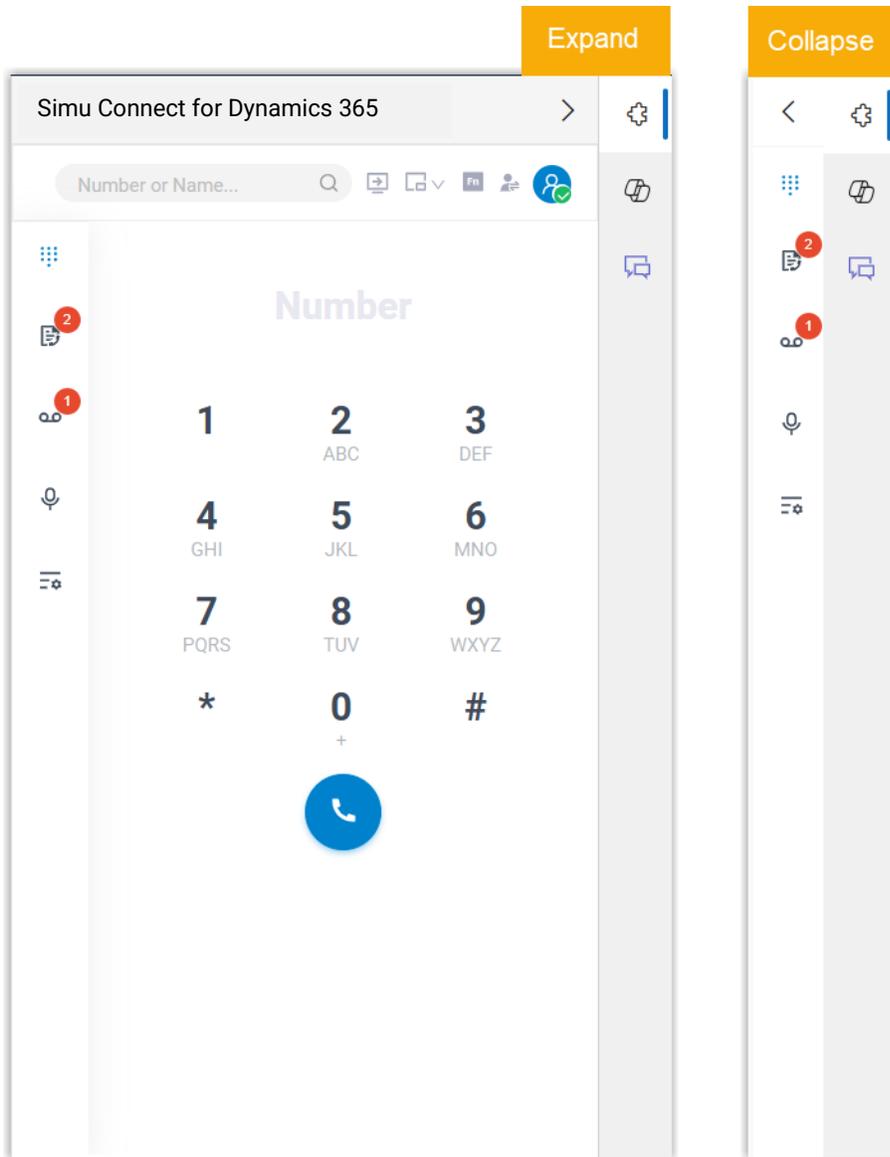
Feature	Description
	
	<p>Use function keys to monitor status of specific objects, or quickly perform specific operations via function keys.</p>
	<p>Change your agent status in a specific queue or in all queues you belong to.</p>
	<p>Change your extension presence, or log out.</p>

Workspace

An area where you can view or manage specific features.

Collapse button

A toggle button used to expand or collapse the plugin pane within the Dynamics 365 interface.



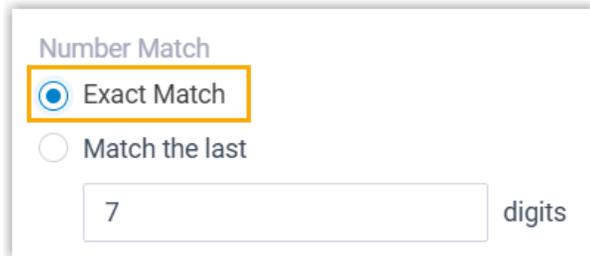
Configure Preference Settings

Configure Number Matching in Dynamics 365

This topic describes how to configure number matching rules to search and match external numbers of inbound or outbound calls with existing CRM contacts in Dynamics 365.

Procedure

1. Log in to the 'Simu Connect for Dynamics 365' plugin, click .
2. Go to the **Dynamics Integration** tab.
3. In the **Number Match** section, do as follows:
 - To match the full external number, select **Exact Match**.



Number Match

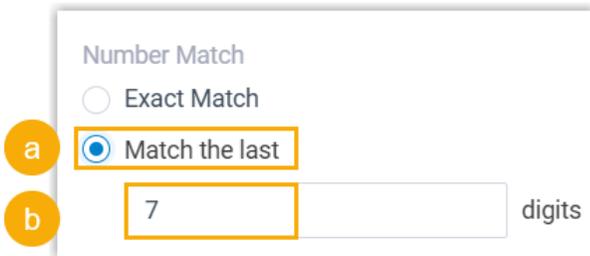
Exact Match

Match the last

7 digits

If selected, Dynamics 365 will search for records stored in the CRM based on the full external number, and return only exact matches.

- To match only part of the external number, select **Match the last *{{x}}* digits**, then specify the number of digits.



Number Match

Exact Match

Match the last

7 digits

If selected, Dynamics 365 performs a fuzzy match by comparing only the last *{{x}}* digits of the external number with records stored in the CRM.

4. Click **Save**.

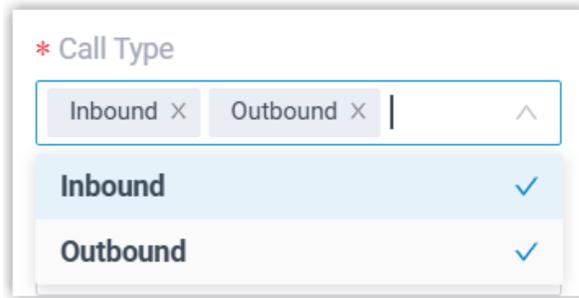
Set up Contact Creation

This topic describes how to configure automatic or manual contact creation. When you receive a call from an unknown number or place a call to an unknown number, a new contact can be created in Dynamics 365 CRM.

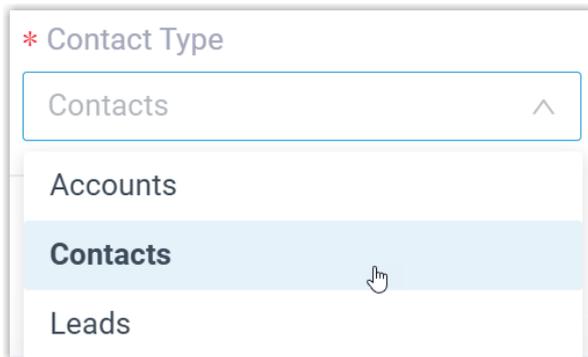
Procedure

1. Log in to the 'Simu Connect for Dynamics 365' plugin, click .

2. Go to the **Dynamics Integration** tab.
3. Configure the method of contact creation according to your needs.
 - If you want the system to automatically create contacts in the CRM based on specified types of calls, do as follows:
 - a. Select the checkbox of **Auto Create Dynamics Contact**.
 - b. In the **Call Type** drop-down list, select when will a contact be automatically created in Dynamics 365 CRM.



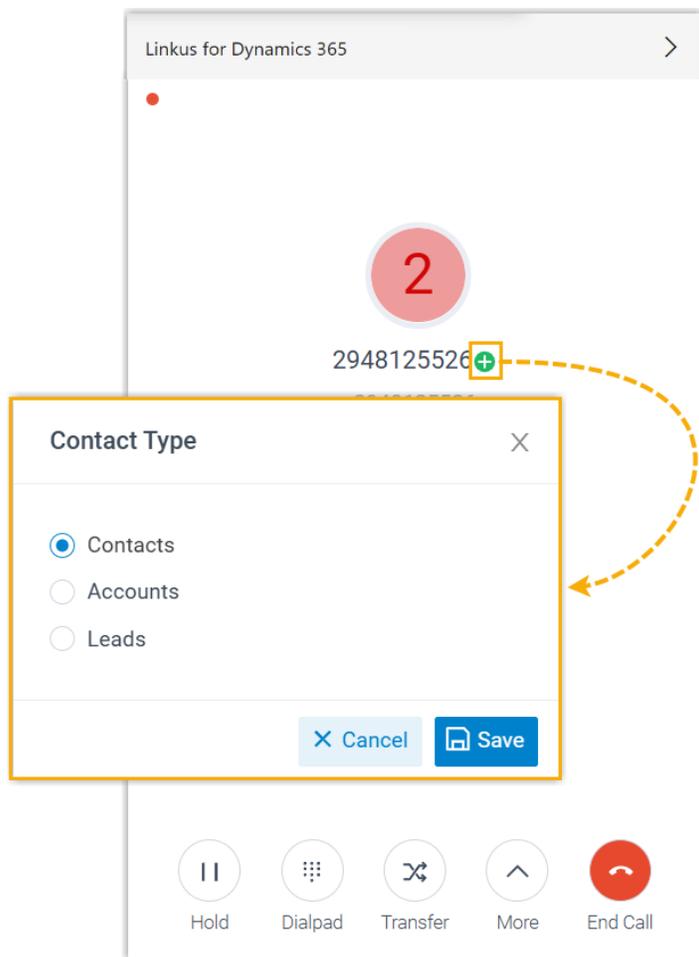
- **Inbound**: Inbound call from an unknown number that doesn't match an Account, Contact, or Lead already in the CRM.
 - **Outbound**: Outbound call to an unknown number that doesn't match an Account, Contact, or Lead already in the CRM.
- c. In the **Contact Type** drop-down list, select the type of contact to be created.



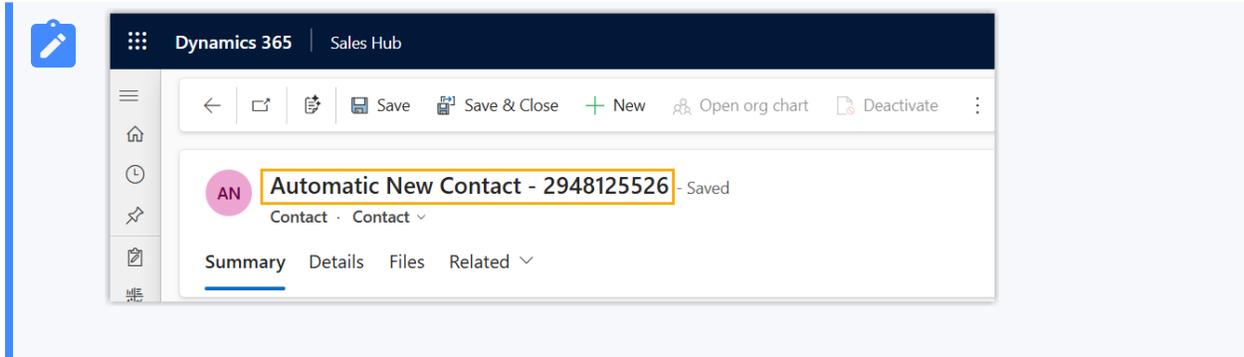
- **Accounts**: Save the unknown number as a Accounts.
 - **Contacts**: Save the unknown number as a Contact.
 - **Leads**: Save the unknown number as a Lead.
- If you prefer to review unknown numbers and manually add it as a contact, unselect the checkbox of **Auto Create Dynamics Contact**.
4. Click **Save**.

Result

- If automatic creation is enabled, when a call from an unknown number is received, or a call is placed to an unknown number, the number will be added as the specified type of contact in Dynamics 365 CRM.
- If automatic creation is disabled, you can manually add an unknown number as a new contact during the call.

**Note:**

The name of the newly created contact has a prefix of `Automatic New Contact` followed by the number.

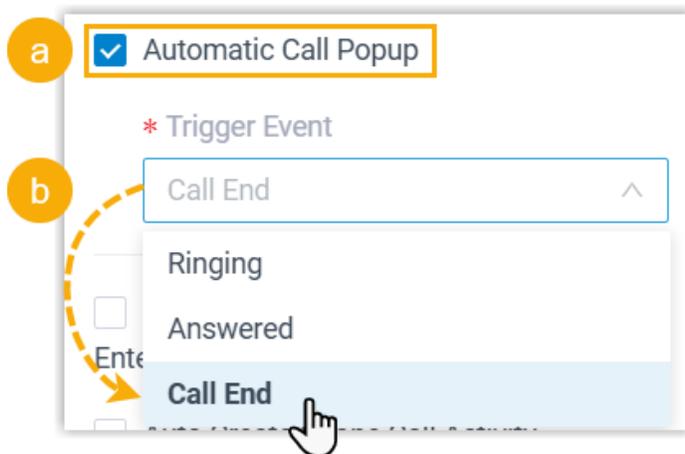


Set up Call Popup

This topic describes how to set up call popup to be automatically triggered by a specified call event, or be manually opened during a call.

Procedure

1. Log in to the 'Simu Connect for Dynamics 365' plugin, click .
2. Go to the **Dynamics Integration** tab.
3. Configure the method of call popup according to your needs.
 - If you want the system to automatically open the CRM contact details page upon inbound calls, do as follows:



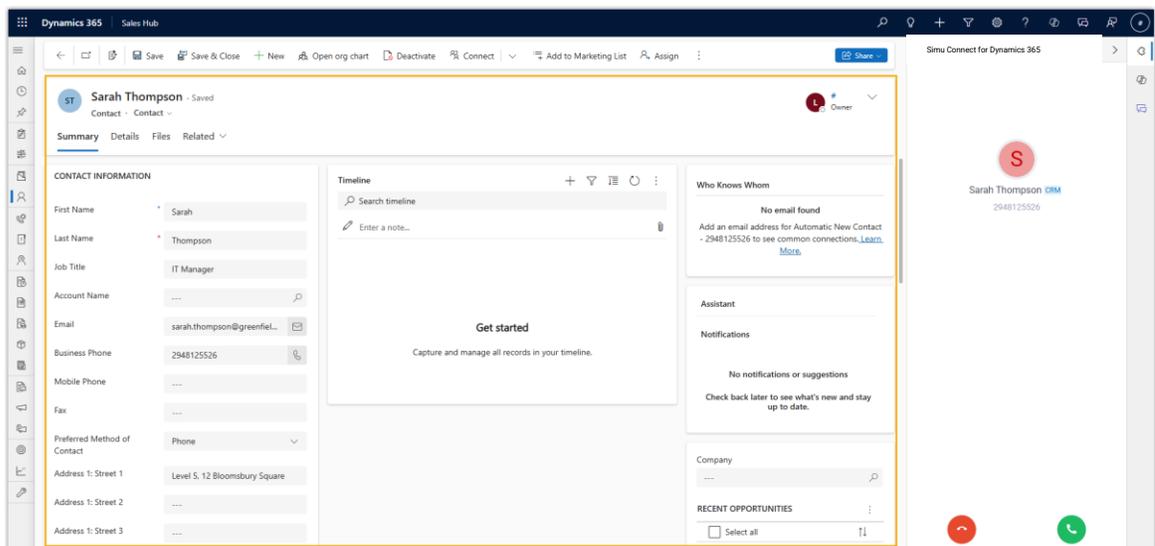
- a. Select the checkbox of **Automatic Call Popup**.
- b. In the **Trigger Event** drop-down list, set when the call popup will be automatically triggered.
 - **Ringing**: Triggered when you receive an inbound call from a CRM contact.

- **Answered:** Triggered when you answer an inbound call from a CRM contact.
- **Call End:** Triggered when you end a call with a CRM contact.
- If you prefer to manually open the CRM contact details page, unselect the checkbox of **Automatic Call Popup**.

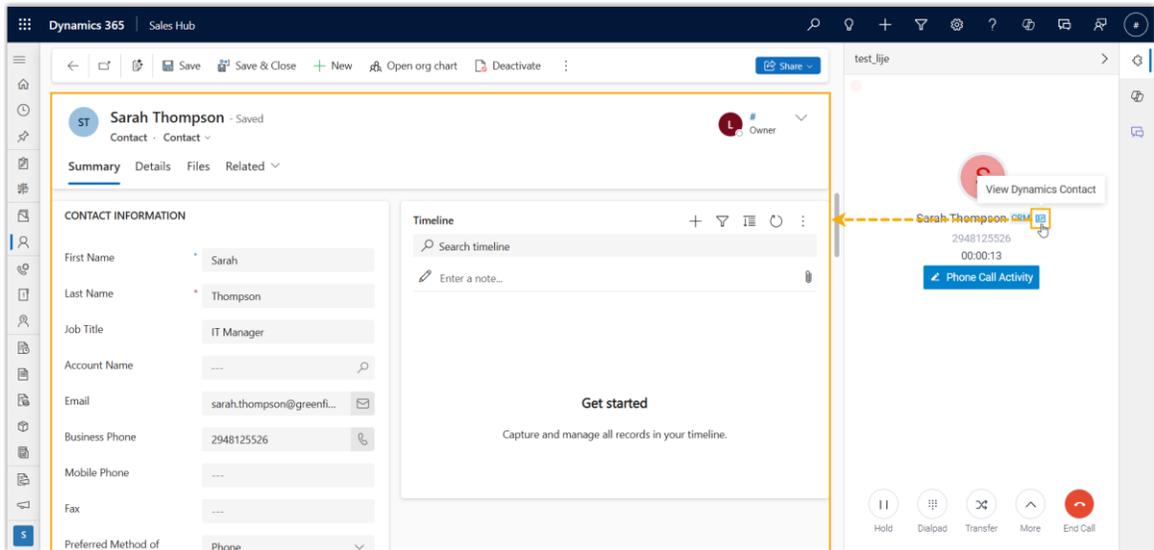
4. Click **Save**.

Result

- If automatic call popup is enabled, when the specified trigger event occurs on an inbound call from a CRM contact, the contact details page will be opened in the CRM interface to show the contact's information.



- If automatic call popup is disabled, you can click  on the call window to manually open the contact details page during a call with the CRM contact.

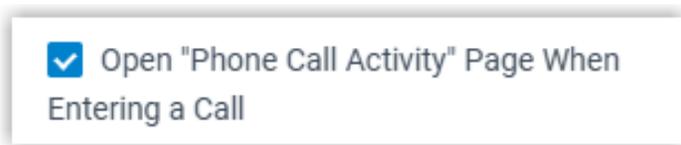


Set up Phone Call Activity Creation

This topic describes how to set up automatic or manual creation of phone call activities, allowing all calls made to or received from external numbers to be recorded in Dynamics 365 CRM.

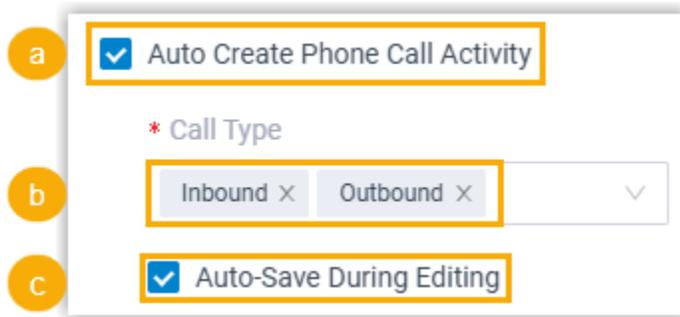
Procedure

1. Log in to the 'Simu Connect for Dynamics 365' plugin, click .
2. Go to the **Dynamics Integration** tab.
3. **Optional:** Select the checkbox of **Open "Phone Call Activity" Page When Entering a Call**.



When an inbound or outbound call is answered, the system will automatically open a "Phone Call Activity" page for you to record call details.

4. Configure the method of phone call activity creation according to your needs.
 - If you want the system to automatically create a phone call activity for external calls, do as follows:



- a. Select the checkbox of **Auto Create Phone Call Activity**.
- b. In the **Call Type** drop-down list, select when will a phone call activity be automatically created.
 - **Inbound**: When an inbound call is answered.
 - **Outbound**: When an outbound call is answered.
- c. **Optional**: Select the checkbox of **Auto-Save During Editing** to automatically save changes as you make them.

If disabled, changes are saved only when you click **Save**.

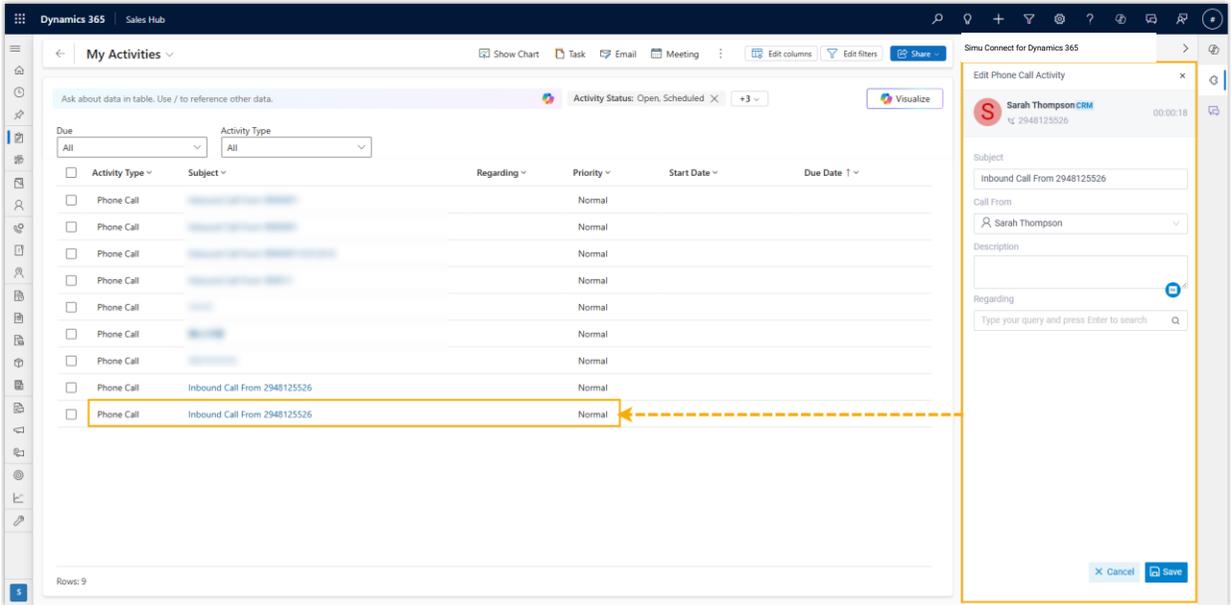
- If you prefer to manually create a phone call activity during an external call, unselect the checkbox of **Auto Create Phone Call Activity**.

5. Click **Save**.

Result

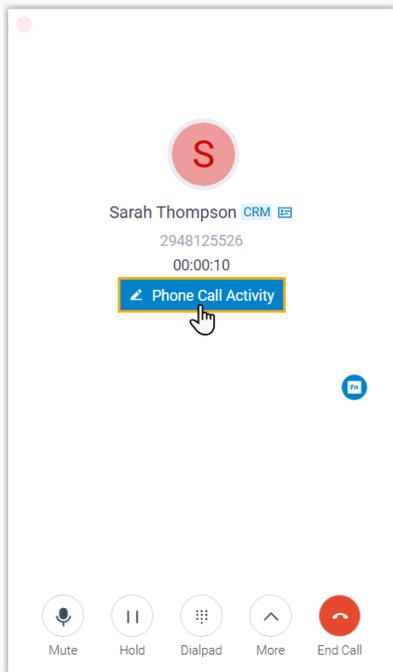
When an inbound or outbound call is answered, a **Phone Call Activity** page automatically opens in the call window, allowing you to record call details.

- If phone call activity auto creation is enabled, a record is automatically created in Dynamics 365 when the call is answered. You can update the details within the call window, and the changes will be synced to the phone call activity record.
- If phone call activity auto creation is disabled, you can manually enter the call details, and a corresponding phone call activity record will be created in the CRM when you save the call details.



Note:

- If the page does not open automatically (**Open "Phone Call Activity" Page When Entering a Call** is disabled), you can click **Phone Call Activity** in the call window to manually open the page.





- For more information about the phone call activity, see [Add or Update Phone Call Activity](#).

Related information

[Enable Call Recording Playback in Dynamics 365](#)

Enable Call Recording Playback in Dynamics 365

This topic describes how to enable call recording access within Dynamics 365. After enabled, the PBX will automatically sync call recordings to the corresponding phone call activity in Dynamics 365, allowing users to play the call recordings directly from the CRM.

Prerequisites

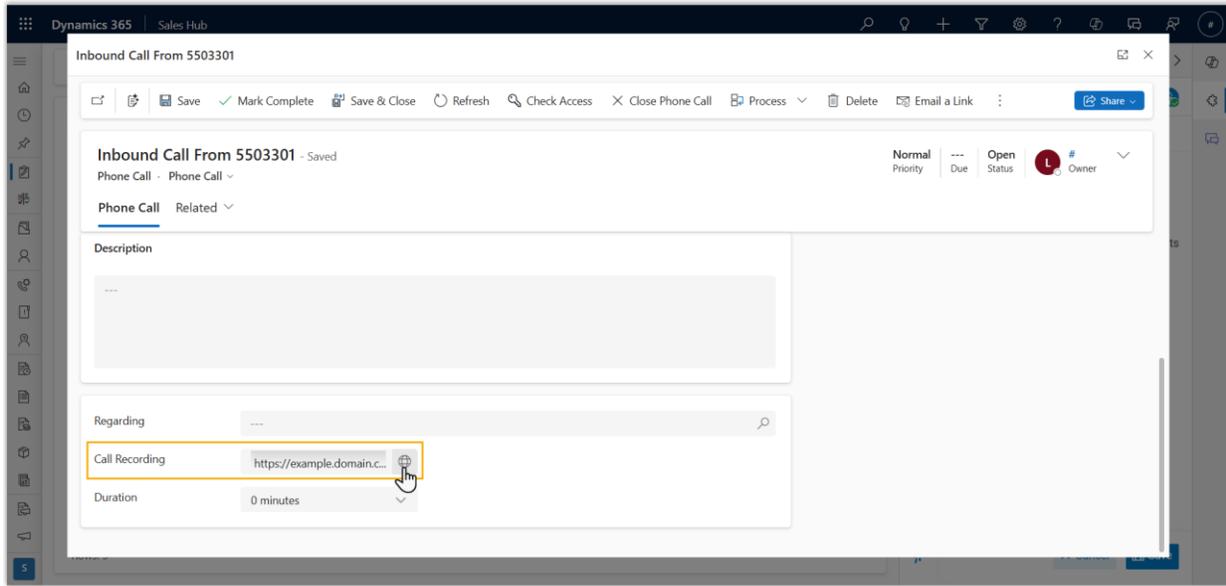
You have [set up phone call activity creation](#) to ensure that call logs are synced to the corresponding phone call activities in Dynamics 365.

Procedure

1. Log in to the 'Simu Connect for Dynamics 365' plugin, click .
2. Go to the **Dynamics Integration** tab.
3. Select the checkbox of **Play Call Recording**.
4. Click **Save**.

Result

You can directly view and play call recordings stored on the PBX from the corresponding phone call activity in Dynamics 365.



Set up Auto Launch for 'Simu Connect for Dynamics 365'

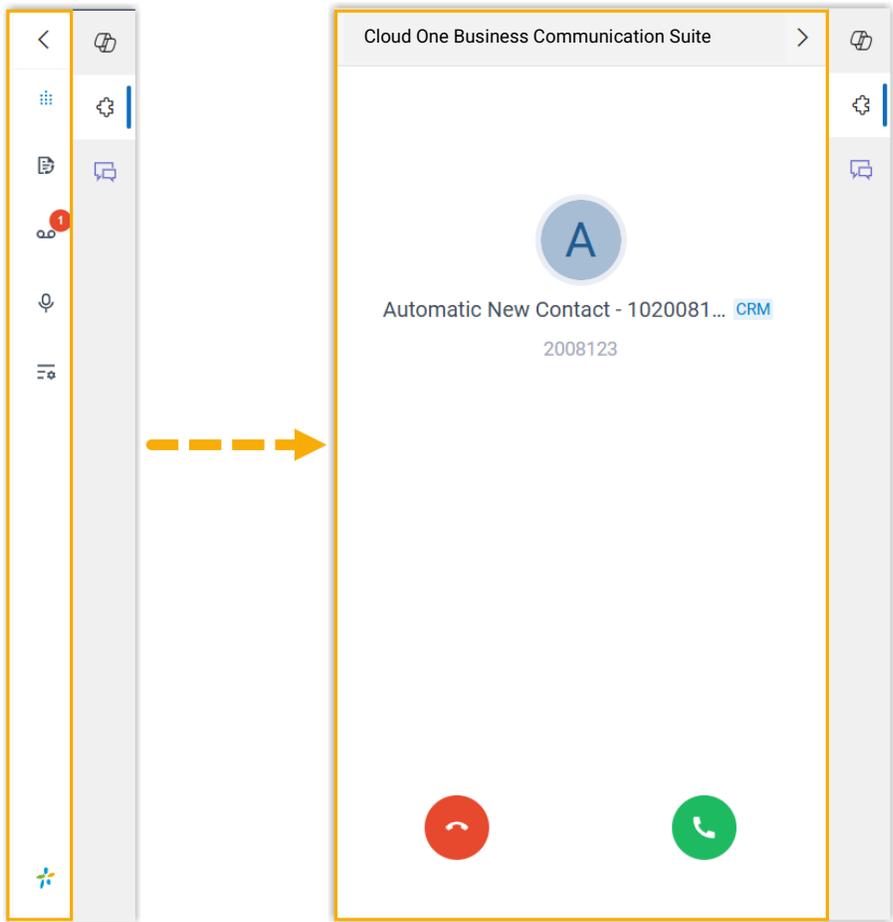
This topic describes how to configure the 'Simu Connect for Dynamics 365' plugin to automatically launch when an incoming call is received.

Procedure

1. Log in to the 'Simu Connect for Dynamics 365' plugin, click .
2. Go to the **Dynamics Integration** tab.
3. Select the checkbox of **Auto-Launch the App Upon Incoming Call**.
4. Click **Save**.

Result

When an incoming call is received while the plugin is collapsed, it will automatically expand to notify you of the call.

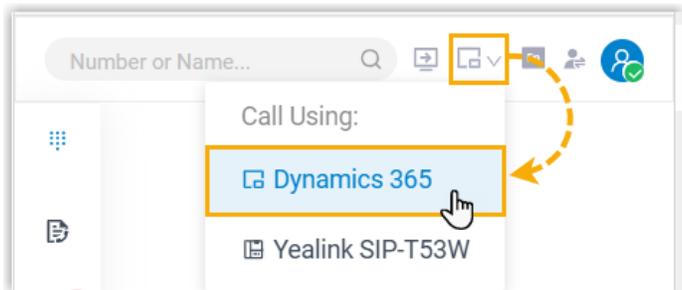


Configure Audio Devices

This topic describes how to select your preferred audio devices for handling calls in the 'Simu Connect for Dynamics 365' plugin.

Requirements

The plugin is running in **Dynamics 365** mode.



Procedure

1. Log in to the 'Simu Connect for Dynamics 365' plugin, click .
2. Go to the **Audio** tab.
3. Select desired device from the drop-down list of **Microphone, Speaker, and Ringing Device**.
4. Click **Save** to apply the changes.

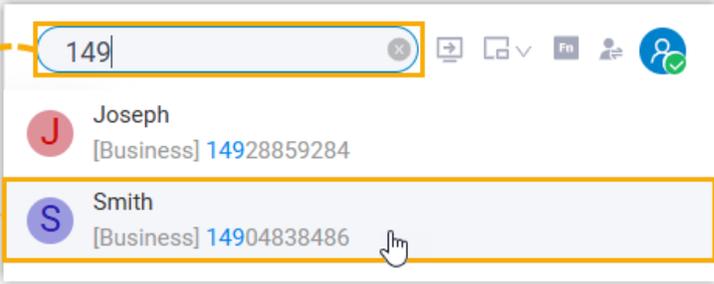
Manage Calls in 'Simu Connect for Dynamics 365'

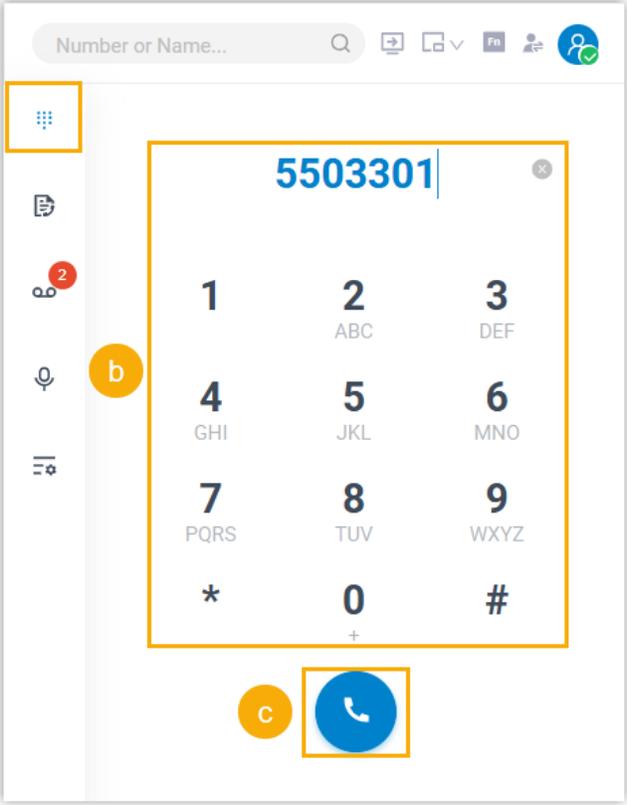
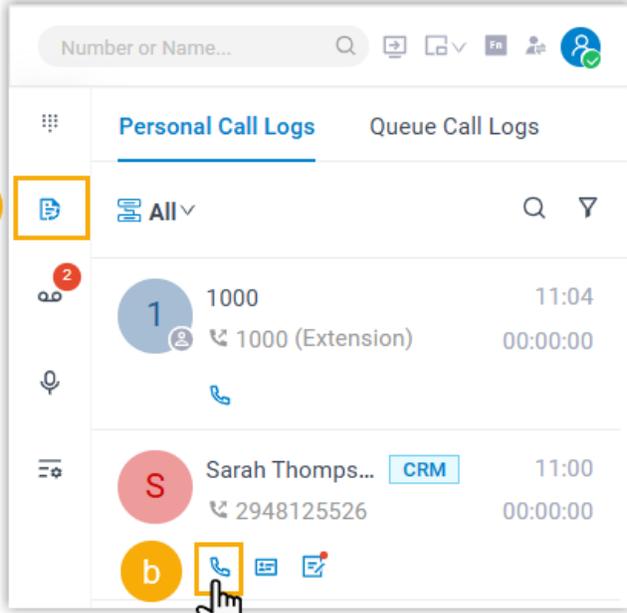
Place a Call within Dynamics 365

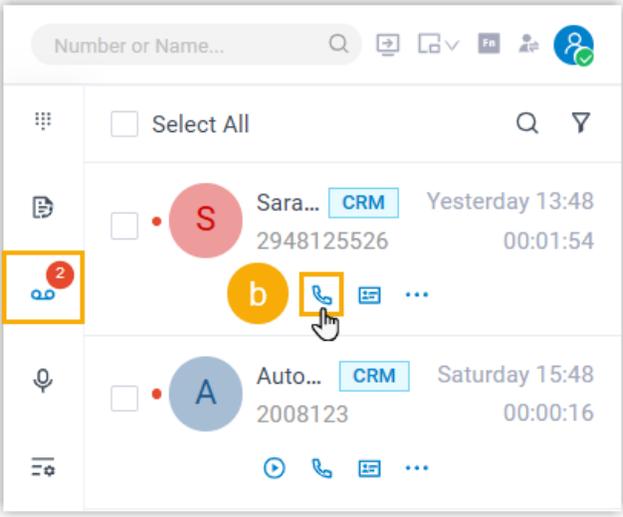
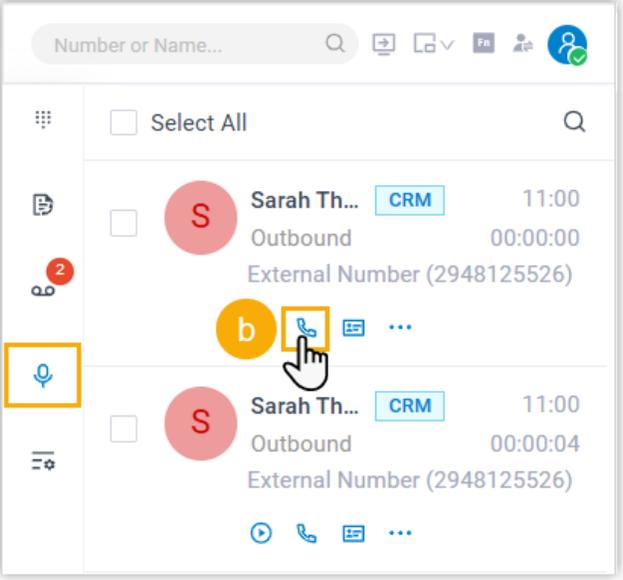
This topic describes the ways to place a call within dynamics 365 using the 'Simu Connect for Dynamics 365' plugin.

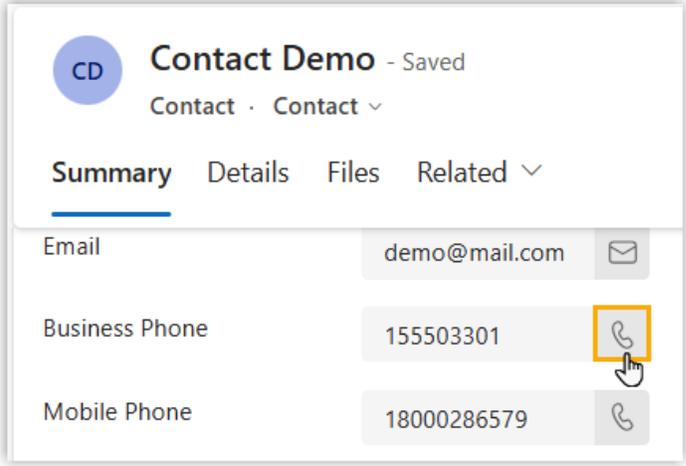
Procedure

1. Log in to your extension in the 'Simu Connect for Dynamics 365'.
2. Make an audio call.
You can make an audio call through the plugin via the following ways.

Scenario	Instruction
Call from search result	 <ol style="list-style-type: none"> a. In the search bar, search the desired contact stored on the PBX by number or name. b. Click the desired search result to call out.

Scenario	Instruction
Call from dialpad	 <p>a. Go to the Dial Pad page.</p> <p>b. Enter or dial the desired number.</p> <p>c. Press  to call out.</p>
Call from call logs	 <p>a. Go to the Call Logs page.</p> <p>b. Press  to call out.</p>

Scenario	Instruction
	<p>a. Go to the Call Logs page.</p> <p>b. Click  of the desired call log.</p>
Call from voicemails	 <p>a. Go to the Voicemails page.</p> <p>b. Click  of the desired voicemail.</p>
Call from recordings	 <p>a. Go to the Recordings page.</p> <p>b. Click  of the desired recording.</p>
Call from Dynamics interface	<p>a. Go to the desired contact details page of Dynamic 365 CRM.</p> <p>b. Click  beside the desired number.</p>

Scenario	Instruction
	 <p>The screenshot shows a contact record for 'Contact Demo' with the following details:</p> <ul style="list-style-type: none"> Email: demo@mail.com Business Phone: 155503301 (highlighted with a yellow box and a mouse cursor pointing to the phone icon) Mobile Phone: 18000286579

Add or Update Phone Call Activity

This topic describes how to add or update phone call activity details during an active call, ensuring that all call-related information is properly logged for future reference.

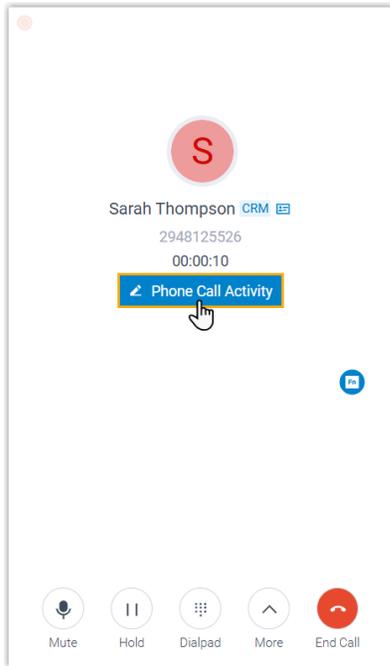
Procedure

1. During an active call, click **Phone Call Activity** to open the "Phone Call Activity" page.



Note:

If [Open "Phone Call Activity" Page When Entering a Call](#) is enabled, the page opens automatically after the call is answered.



2. Add or edit details about the call.

Create Phone Call Activity ×

 **Sarah Thompson CRM** 00:01:07
 2948125526

Subject
 Consult about network infrastructure upgrading

Call From
 Sarah Thompson ▼

Description
 Client is interested in solutions that enhance stability and scalability. A follow-up meeting may be required to evaluate specific proposals.

Regarding
 Upgrade Network Infrastructure ×

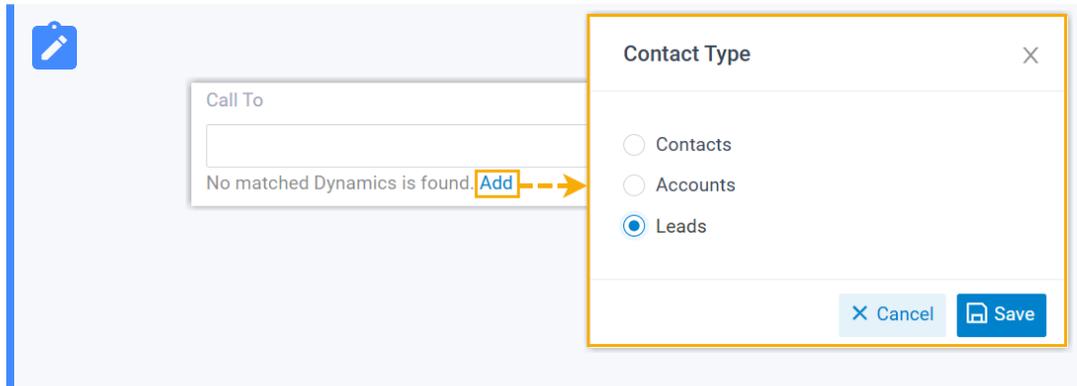
× Cancel Save

- **Subject:** Enter the subject of the call.
- **Call From:** Automatically display the matched Dynamics contact.



Note:

- If more than one contacts are matched, you can select the desired one from the drop-down list.
- If there is no match, you can click **Add** to save the number as a Dynamics contact.



- **Description:** Enter a detailed description for the call.
- **Regarding:** Enter keywords and press **Enter** to search relevant records in Dynamics 365, then select the appropriate records to associate with the call.

**Note:**

Currently, only the **Topic** field in **Opportunities** is supported for search.

3. Click **Save**.
4. Click **×** to close the page.

Result

The phone call activity is updated to Dynamics 365 and associated with the specified contact and record.

Consult about network infrastructure upgrading

Save Mark Complete Save & Close Refresh Check Access Close Phone Call Process Delete Email a Link

Consult about network infrastructure upgrading - Saved
Phone Call · Phone Call

Phone Call Related

Subject * Consult about network infrastructure upgrading

Call From * Sarah Thompson

Call To *

Phone Number --- Direction Incoming

Description

Client is interested in solutions that enhance stability and scalability. A follow-up meeting may be required to evaluate specific proposals.

Regarding Upgrade Network Infrastructure

Call Recording ---

Duration 1 minute

Flip an Active Call between Devices

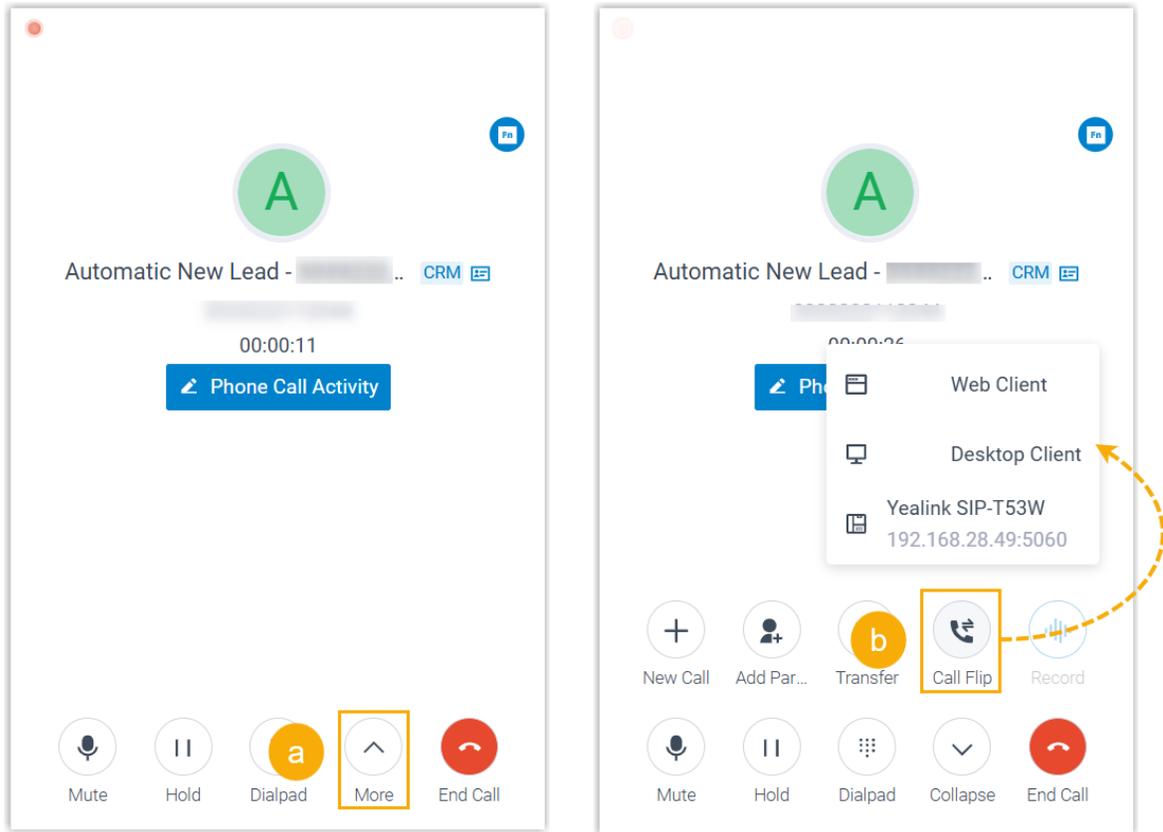
Call Flip feature allows you to effortlessly and seamlessly flip an active call from 'Simu Connect for Dynamics 365' plugin to another device (with your extension registered), without any interruption to the conversation.

Requirements

Your extension has been registered on more than one device.

Procedure

1. During an active call, click **More**, then click **Call Flip**.



All the other devices where your extension is registered are displayed.

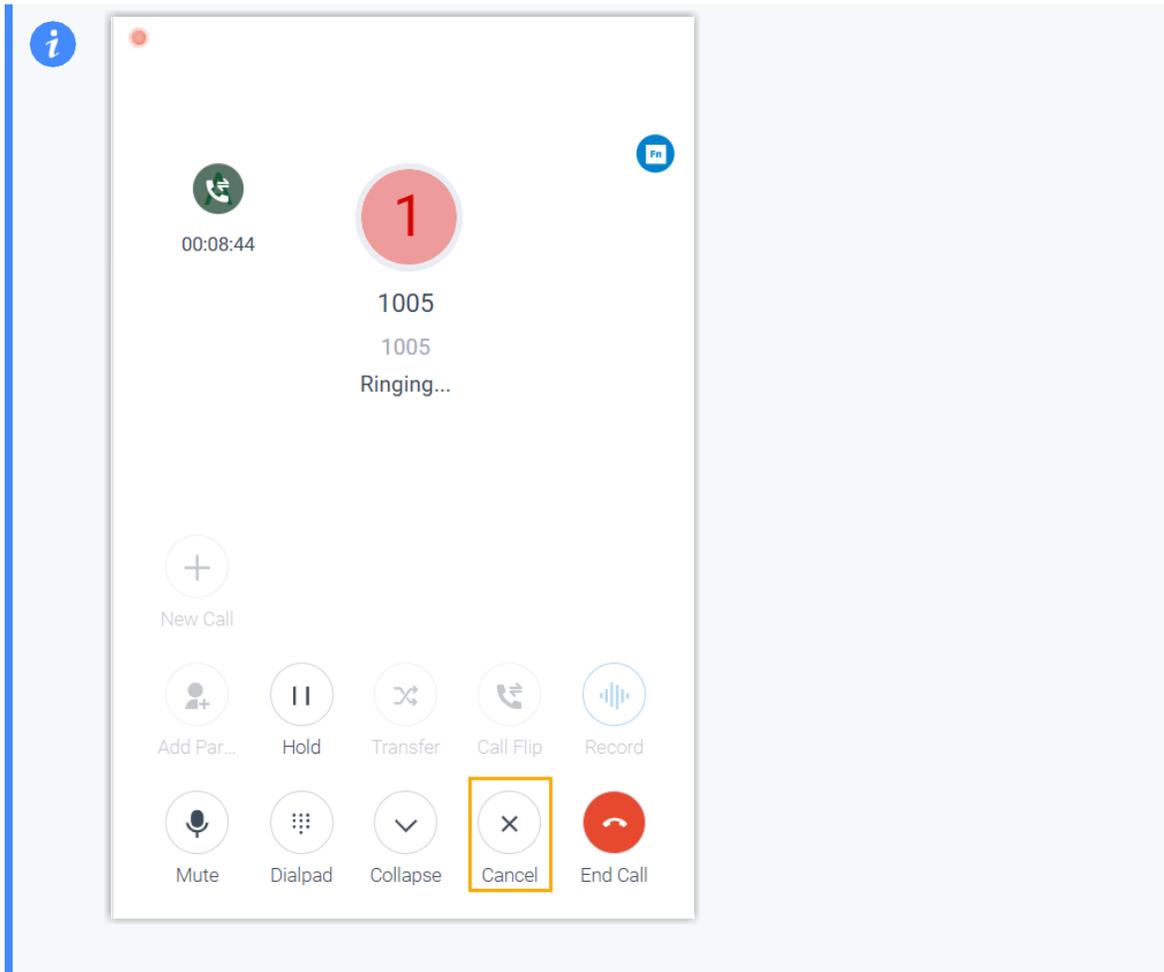
2. Click the desired device.

Simu Connect will make a call to your extension on the device.



Tip:

In case you want to cancel call flip, click **Cancel** at the bottom of the call screen.



3. Answer the call on the selected device.

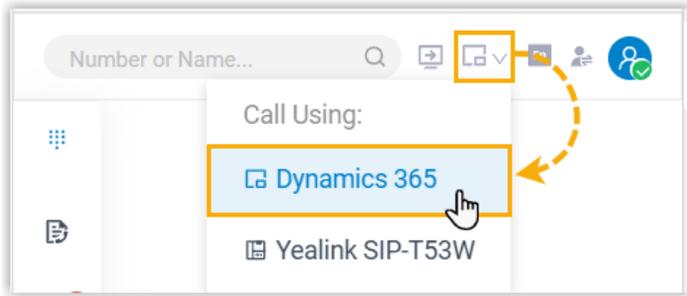
The call is flipped from 'Simu Connect for Dynamics 365' to the selected device.

Continue an Active Call on 'Simu Connect for Dynamics 365'

Call Switch feature allows you to retrieve an active call from the original device (with your extension registered), and continue it on 'Simu Connect for Dynamics 365', without any interruption to the conversation.

Requirements

- The plugin is running in **Dynamics 365** mode.

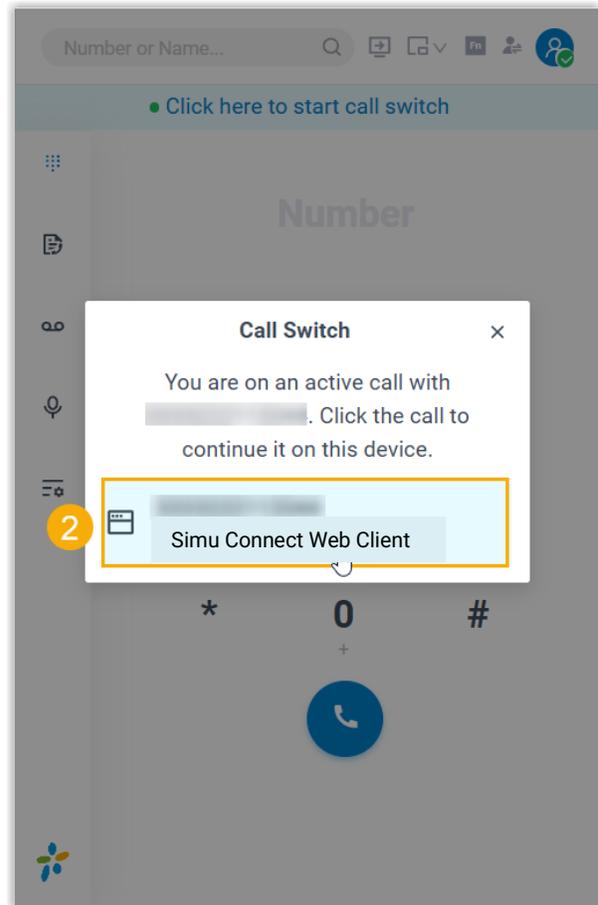
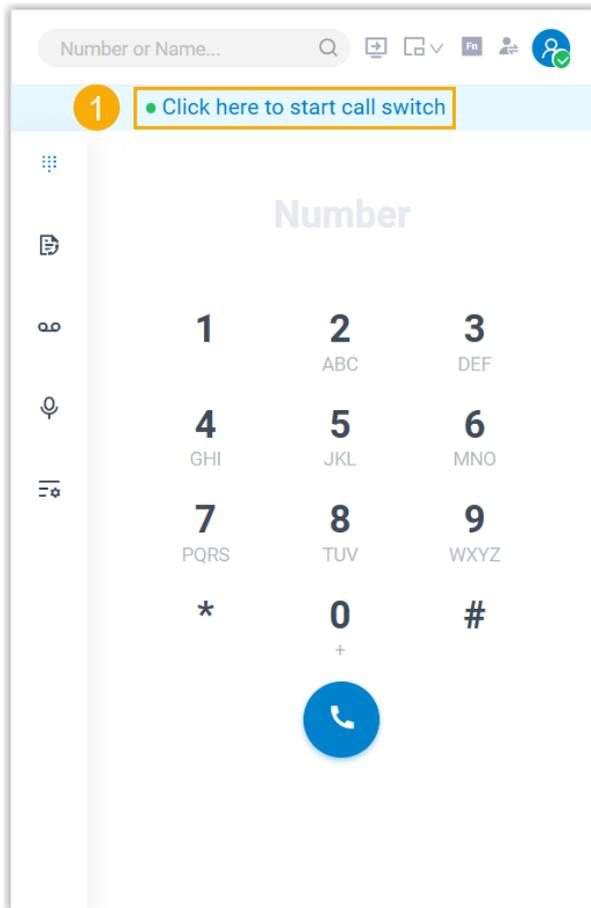


- Your extension has been registered on more than one device.

Prerequisites

You have an active call on another device.

Procedure



1. On the top of 'Simu Connect for Dynamics 365', click **Click here to start call switch**. The active call on another device is displayed.

2. Click the call.

Result

The call is retrieved from the original device to the 'Simu Connect for Dynamics 365' plugin.

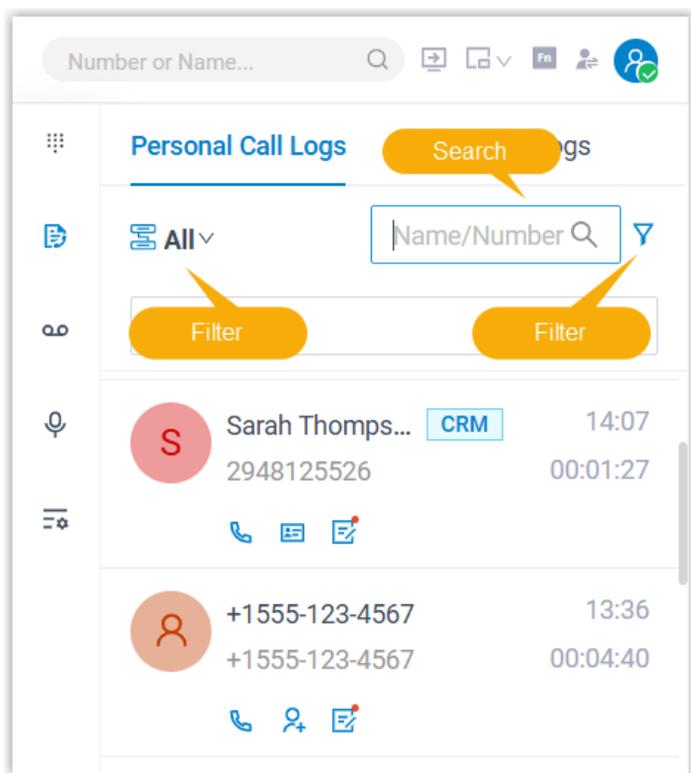
Manage Call Features in 'Simu Connect for Dynamics 365'

Manage Call Logs

This topic describes how to check and manage your call logs in the 'Simu Connect for Dynamics 365' plugin.

Procedure

1. On the plugin, go to **Call Logs**, then go to the **Personal Call Logs / Queue Call Logs** as needed.
2. **Optional:** Search or filter the desired call logs.



3. Check and manage the call logs according to your needs.

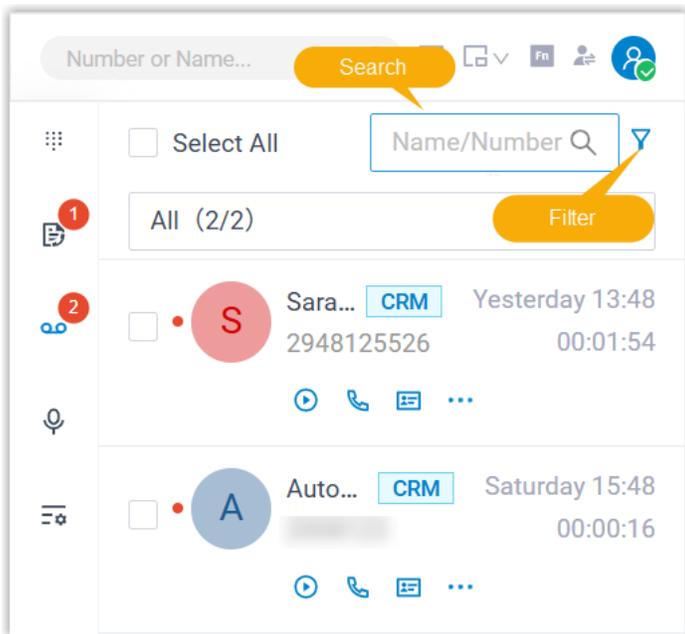
Operation	Instruction
Place a call	Place a call from call log via either of the following methods: <ul style="list-style-type: none"> • Double click a record. • Click  of the call log.
Add a Dynamics contact	To add an unknown external number as a Dynamics contact, do as follows: <ol style="list-style-type: none"> a. Click  of the call log. b. In the pop-up window, select the type of contact, then click Save. A new contact is created and the details page automatically opens in the main area of Dynamics 365.
View the information of the Dynamics contact	Click  of the call log. The contact details page opens in the main area of Dynamics 365 CRM.
Create or edit a phone call activity	To create or edit the phone call activity of the call, do as follows: <ol style="list-style-type: none"> a. Click  of the call log. b. In the Phone Call Activity page, enter the call details. c. Click Save. d. Click  to close the page. The phone call activity is updated and synced to Dynamics 365 CRM.

Manage Voicemails

This topic describes how to check and manage your voicemails in the 'Simu Connect for Dynamics 365' plugin.

Procedure

1. On the plugin, go to **Voicemails**.
2. **Optional:** Search or filter the desired voicemails.



3. Check and manage the voicemails according to your needs.

Operation	Instruction
Listen to a voicemail	Click  of the voicemail. An unread voicemail will be marked as read.
Place a call	Place a call from voicemail via either of the following methods: <ul style="list-style-type: none"> • Double click a record. • Click  of the voicemail.
View the information of the Dynamics contact	Click  of the voicemail. The contact details page opens in the main area of Dynamics 365.
Download a voicemail	To download a voicemail, do as follows: <ol style="list-style-type: none"> a. Click  of the voicemail. b. Select Download. The voicemail is downloaded to your computer.
Change the read status	<ul style="list-style-type: none"> • To mark a voicemail as read or unread, do as follows: <ol style="list-style-type: none"> a. Click  of the voicemail. b. Click Mark as Read or Mark as unread. • To bulk mark voicemails as read, do as follows: <ol style="list-style-type: none"> a. Select the checkboxes of the desired records. b. At the top-right corner, click .

Operation	Instruction
Delete voicemail(s)	<ul style="list-style-type: none"> • To delete a voicemail, do as follows: <ol style="list-style-type: none"> a. Click  of the voicemail. b. Select Delete. • To bulk delete voicemails, do as follows: <ol style="list-style-type: none"> a. Select the checkboxes of the desired records. b. At the top-right corner, click .

Manage Call Recordings

This topic describes how to check and manage your call recordings in the 'Simu Connect for Dynamics 365' plugin.

Procedure

1. On the plugin, go to **Recordings**.
2. Check and manage the call recordings according to your needs.

Operation	Instruction
Listen to a call recording	Click  of the call recording.
Place a call	Place a call from call recording via either of the following methods: <ul style="list-style-type: none"> • Double click a record. • Click  of the call recording.
View the information of the Dynamics contact	Click  of the call recording. The contact details page opens in the main area of Dynamics 365.
Download a call recording	To download a call recording, do as follows: <ol style="list-style-type: none"> a. Click  of the call recording. b. Select Download. <p>The call recording file is downloaded to your computer.</p>
Delete call recording(s)	<ul style="list-style-type: none"> • To delete a call recording, do as follows: <ol style="list-style-type: none"> a. Click  of the call recording. b. Select Delete. • To bulk delete call recordings, do as follows: <ol style="list-style-type: none"> a. Select the checkboxes of the desired records. b. At the top-right corner, click .